BSBWRT401
Write complex documents
Release 1

Learner guide

Aspire learning resources

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Aspire Version 1.1

aspire
learning resources

BSBWRT401 Write complex documents Release 1

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Contents

Before you begin

This learner guide is based on the unit of competency *BSBWRT401 Write complex documents*, Release 1. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of competency and assessment requirements at: www.training.gov.au.

How to work through this learner guide

This learner guide contains a number of features that will assist you in your learning. Your trainer will advise which parts of the learner guide you need to read, and which practice tasks and learning checkpoints you need to complete. The features of this learner guide are detailed in the following table.

Feature of the learner guide	How you can use each feature
Learning content	Read each topic in this learner guide. If you come across content that is confusing, make a note and discuss it with your trainer. Your trainer is in the best position to offer assistance. It is very important that you take on some of the responsibility for the learning you will undertake.
Examples and case studies	Examples of completed documents that may be used in a workplace are included in this learner guide. You can use these examples as models to help you complete practice tasks and learning checkpoints. Case studies highlight learning points and provide realistic examples of workplace situations.
Practice tasks	Practice tasks give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which practice tasks to complete.
Video clips	Where QR codes appear, learners can use smartphones and other devices to access video clips relating to the content. For information about how to download a QR reader app or accessing video on your device, please visit our website: www.aspirelr.com.au/help
Summary	Key learning points are provided at the end of each topic.
Learning checkpoints	There is a learning checkpoint at the end of each topic. Your trainer will tell you which learning checkpoints to complete. These checkpoints give you an opportunity to check your progress and apply the skills and knowledge you have learnt.

Foundation skills

As you complete learning using this guide, you will be developing the foundation skills relevant for this unit. Foundation skills are the language, literacy and numeracy (LLN) skills and the employability skills required for participation in modern workplaces and contemporary life.

The following table outlines specific foundation skills noted for your learning in this learner guide.

Foundation skill area	Foundation skill description
Reading	• Interprets information to identify requirements and prepares material suitable to target audience and environment • Proofreads texts for accuracy
Writing	• Creates documents for a specific audience using cohesive and well-structured language to convey detailed and accurate information • Ensures vocabulary, layout and grammatical arrangement achieves meaning and intent of document
Oral communication	• Obtains information or clarifies requirements by asking questions and listening
Navigate the world of work	• Adheres to organisational policies and procedures related to document production
Interact with others	• Follows accepted communication practices and protocols when seeking advice about documents from colleagues, supervisors and managers
Get the work done	• Plans, organises and implements tasks required to produce documents • Makes decisions based on standard procedures, using more formal decision making processes where required • Uses the main features and functions of digital tools to complete work tasks

What do you already know?

Use the following table to identify what you may already know. This may assist you to work out what to focus on in your learning.

Topic	Key outcome	Rate your confidence in each section
Topic 1 Plan documents	1A Determine the document purpose	❑ Confident ❑ Basic understanding ❑ Not confident
	1B Choose appropriate document format	❑ Confident ❑ Basic understanding ❑ Not confident
	1C Establish the means of communication	❑ Confident ❑ Basic understanding ❑ Not confident
	1D Determine document requirements	❑ Confident ❑ Basic understanding ❑ Not confident
	1E Determine content and order	❑ Confident ❑ Basic understanding ❑ Not confident
	1F Develop an overview of structure and content	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 2 Draft text	2A Review and organise material	❑ Confident ❑ Basic understanding ❑ Not confident
	2B Prepare text	❑ Confident ❑ Basic understanding ❑ Not confident
	2C Include graphics	❑ Confident ❑ Basic understanding ❑ Not confident
	2D Identify and fill information gaps	❑ Confident ❑ Basic understanding ❑ Not confident
	2E Draft text	❑ Confident ❑ Basic understanding ❑ Not confident

Topic	Key outcome	Rate your confidence in each section
	2F Use appropriate language	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 3 Prepare final text	3A Review draft text	❑ Confident ❑ Basic understanding ❑ Not confident
	3B Check for accuracy	❑ Confident ❑ Basic understanding ❑ Not confident
	3C Obtain approval for draft text	❑ Confident ❑ Basic understanding ❑ Not confident
	3D Incorporate revisions	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 4 Produce a document	4A Choose appropriate design elements	❑ Confident ❑ Basic understanding ❑ Not confident
	4B Use word processing software	❑ Confident ❑ Basic understanding ❑ Not confident
	4C Check documents	❑ Confident ❑ Basic understanding ❑ Not confident

Topic 1
Plan documents

Team leaders or frontline managers are often required to produce complex business documents. While these can vary substantially based on the organisation and the position held, there are common requirements for most documents. Whether you are producing a quarterly report, marketing proposal, funding request or tender document, your document must be written so that it is easily understood by the audience.

Taking time to plan a document carefully helps to communicate key messages to your audience and saves you time later in the writing process. Planning a document also allows you to consider the structure and presentation of the document, what information you may need from other areas of the organisation, how much time you may need to prepare the document and what approvals you may require before releasing the document. This helps you develop a quality document in the required time frame.

In this topic you will learn how to:

1A Determine the document purpose

1B Choose appropriate document format

1C Establish the means of communication

1D Determine document requirements

1E Determine content and order

1F Develop an overview of structure and content

1A Determine the document purpose

The first step in planning your document is to understand why you are preparing it. The information you gather at this stage will help you decide what sort of language you should use, your style, the communication method, and so on.

If you are being briefed on the report by your manager or by another area of the organisation, ask them detailed questions about how the document will be used, the main audience and the primary objective of the document. This not only helps make your document more effective, it also helps ensure you produce the type of document they are expecting. In turn, this saves time by reducing the amount of editing required at a later stage.

Purpose of a document

Your organisation may require many different sorts of complex documents, ranging from reports, requests for tender, training materials, summaries of research, strategic proposals, funding requests or government submissions, to name just a few. Each of these documents has a different purpose.

When defining the purpose of a document, it is also important to consider the intended audience. Sometimes, this is clear from the purpose. A strategic proposal may be intended for senior management review, while a quarterly report may have a much wider audience. These are some of the common purposes of complex documents.

Convey research findings

Your organisation may research an issue relevant to its activities, such as customer attitudes. You may need to produce a report that summarises this information for other employees. Understanding how the research findings may be applied helps you determine what information to include about the research objective, the method used, the findings, conclusions and any recommended actions.

Document policies, procedures and processes

Organisations need to develop policies, procedures and processes to guide staff. It's important to understand where these documents will be published. If they will be stored on a company intranet, you may choose a different format than if they are being used in training. You may also need to comply with auditing requirements, such as ISO (Internal Standard for Organisation) requirements.

Influence attitudes, opinions and beliefs

There are many types of documents that seek to influence the reader including persuasive letters, and marketing or promotional materials. Understanding your audience is particularly important for these types of documents.

Meet legal requirements

You may need to document a standard policy for your organisation, such as its equal opportunity policy or hiring guidelines, to ensure you meet legal requirements. You should carefully research these requirements before commencing your document to ensure you have included all necessary information in the required format.

Propose recommendations, options and actions

Your role may require you to develop proposals. Key objectives for these documents include presenting enough information for management to make a decision, including addressing any possible risks and concerns. The level of detail required will depend on their preference, the scale of the proposal and the forum in which it will be presented.

Provide data or information

Periodic reports, such as sales reports or progress reports on a large project, may provide status reports to management, for example. You should research where the information will be presented, whether it will be reviewed in advance, and who are the most likely readers, to ensure that it is appropriately written.

Clarify the purpose of a document

Clarifying the purpose is critical to developing an effective document. Seeking answers to the following questions helps you determine a document's purpose.

The audience

Learn as much as you can about the audience, by acknowledging their experience with the subject matter, their language style, how they best receive information, their general education level and any preferences they have for document style.

The presentation forum

The way you are expected to deliver the document influences its structure. You may include less detail for a group presentation than if you were producing training reference materials.

The expected outcome

A clear understanding of how the audience will use the document helps you structure it appropriately. For example, documents may be developed to provide reference material for employees, to inform a decision by management, or to encourage consumers to choose your product.

The expected length

Knowing the expected length of a document or the amount of time available for delivery helps you determine the appropriate level of detail. There may be organisation guidelines on length, or limits on the presentation time. Business proposals may need to be presented within a single A4 page to facilitate decision making.

Answer purpose questions

Effective communication and problem-solving skills are important to help you understand what is required for each document. Developing questions to ask about the purpose, intended audience and timing requirements for each document is one way you can develop these, as well as refining your active listening skills so that you understand the brief clearly. Here are some of the ways to find information.

Answering questions

How you answer the questions relating to purpose depends on your organisation, your job role and how you are initially asked to complete the document. For example, you may be given a clear briefing by your supervisor or manager before you start the document. In this case, you should ask them these questions, and seek their advice on appropriate people to help you, if they do not know the answers.

Deducing answers

You may need to deduce the answers to these questions based on the data you have to include. Clarify your understanding with an appropriate member of your organisation. Review similar documents, or speak with someone who has created similar material. Your colleagues or predecessors in your position may also be able to explain how regularly documents are produced, such as sales reports.

Problem-solving skills

Beyond deducing answers, these may include being responsive to changing requirements or time lines relating to your document, or identifying appropriate solutions when the material you are presenting does not fit exactly with required templates or house style. The more complex a document, the more likely you will need to adopt a problem-solving approach.

Example: determine document purpose

The following example explains the value in spending the time to clarify the purpose of a document.

Simon works in the sales department of a corporate uniforms company. The company have been asked to prepare a submission to provide new uniforms for a chain of automotive repairers. This potential client has requested that the company presents a range of options, together with design costs and costs per uniform, at a presentation three weeks from yesterday. Here is how Simon determines the purpose of the document he needs to prepare.

Seeking clarification

This is a big opportunity, as this potential client is a growing chain, and therefore represents a lot of potential business. Simon takes the request for tender to Hank, the Sales Manager, and asks if he can prepare the submission. Hank agrees, asking Simon to develop a plan for finalising the submission to meet the presentation deadline, and review it with him before he starts working on the submission. As it is potentially a big client, Jess will deliver the presentation, but says Simon should also plan to attend the meeting.

Document planning

Simon returns to his desk, and starts to plan the document. He knows that this potential client will have asked a number of other suppliers to prepare a submission, and thinks that he not only needs to have competitive pricing, but that he also needs to persuade the purchasing officer that they are the best organisation to work with. The purpose of the submission is to win the business. This means that Simon needs to convey all the necessary information about the design of the uniforms, price per item, and the quality of their materials, as persuasively and professionally as possible.

Practice task 1

Which of the following questions will allow you to clarify the purpose of a document? List the numbers in the text box.

1. What is the expected outcome in providing this information?
2. How will the audience best receive information provided in the document?
3. What is my experience in preparing information?
4. In what type of forum are you expected to present the information?
5. Who needs to format the document?
6. Are there limits on the presentation time?
7. What is the expected length of the document?

1B Choose appropriate document format

Understanding the purpose of your document will help you determine the most appropriate way to present the information. If your objective is to provide a detailed synopsis of the previous year's sales, you may choose to develop a report with the full information, and a shorter presentation to deliver the key points to management. However, if your objective is to document current procedures to inform new staff members, you may decide to develop a procedure manual for the company intranet. Consider the following.

Commonly used formats

Some other formats commonly used for business documents include detailed business letters, emails, work instructions, training manuals, customer publications like leaflets and brochures, speeches, public notices or website texts. Your organisation may have some different formats that you are required to use for specific purposes.

Organisational house style

For each of these formats, there may be an accepted style preferred by your organisation. Your organisation may have a house style, which governs how a document is presented. For example, if a group of managers are reviewing documents produced by different people, it is easier to assess them quickly if they follow the same structure and format.

A house style may be as simple as printing business letters on letterhead paper, or as prescriptive as using a standard template for each document type, prescribed colours and size and use of logos. If the document requires external approval, such as a request for council approval of a development plan, then that organisation may have its own required format.

Organisational messages and branding

Many organisations have a communications strategy that depends upon consistent use of branding messages. These may include use of particular marketing messages, logo use, or communication styles. You should comply with these requirements.

Confirming requirements

You should confirm whether there is a required format for your document before you proceed with planning. This may avoid the need to reformat the document at a later stage. Some further examples of the type of format you may choose are provided in the following sections.

Business letters

While business letters can be relatively simple, they can also be formal and quite complex. You may use a detailed business letter to provide a written record of an agreement between two parties, such as documenting the resolution of a dispute between a supplier and customer.

Most organisations have some standard requirements for business letters, such as using letterhead paper, standard letter-writing protocols, or using key marketing messages in the text. Here are some features of business letters that you should bear in mind.

Other requirements

These are similar to those used in a report and may include:

- referring to supporting documentation
- using formatting techniques such as text boxes or indentation to guide the reader
- using numbered headings or sections
- using standard letter-writing protocols.

Record keeping

Business letters are generally used where there is a formal purpose, and where they may need to be referred to for future verification, such as providing a record for legal purposes or to facilitate dispute resolution. When you require business letters for these purposes, it is important to retain a copy for your own records.

Emails

Emails can be used in a similar way to detailed business letters. They are generally seen as a less formal means of correspondence, so many organisations prefer to use letters for creating formal or legal records. However, emails can be used as records or evidence in any dispute, so you should apply as much care to considering their content as with any other document. Following is some information that is useful when using email.

Advantages of using email

Emails have several advantages over letters, including the ability to do the following:

- Send attachments of manageable size.
- Send correspondence more quickly and cheaply.
- Send correspondence to multiple recipients.
- Track receipts.

Considerations when using email

Remember to consider the file size and type of an attachment before sending it. Make sure your recipient can access the file. It is a good idea to send a separate, confirming email to ensure large files have been received.

Although emails may be more casual than letters, you may be subject to some of the same requirements, such as using a standard layout or font, including marketing messages or a confidentiality clause at the end of the email.

Protecting privacy and maintaining confidentiality

An email displays all recipients in the 'to' and 'cc' fields. If you are copying in your manager, it's more courteous to use the 'cc' field and inform other recipients. If you are sending emails to an external group, such as a customer newsletter, you may use the 'bcc' field to protect your customers' privacy.

Take care when sending confidential information by email, particularly with sensitive business or customer details. For this information, you may need to use encryption or password protection. Follow your organisation's policy on what can be sent.

Manuals, instructions and procedures

Manuals, instructions and procedures may be used to convey information for guiding, educating or training staff. These may be standard work instructions or procedures for a department, such as how to prepare the monthly accounts, or they may be training in specific skills, such as customer-service training. Here you will find information that is relevant to the use of these resources.

Standard work instructions and manuals

Business procedures are sometimes documented to conform to external requirements, such as ISO procedures, and you may be required to follow a template to satisfy audit requirements. This is often the case for manuals about work health and safety (WHS) or equal-opportunity policies.

Training material structure

If you are developing training material, you should confirm whether your organisation has a standard template. This may cover layout and presentation, but may also influence the time allocated to each session before breaks are required and other structural elements.

Presentation of manuals, instructions and procedures

How the material is presented will influence the format of manuals, instructions and procedures. Presentation materials that accompany classroom training may be less detailed than materials reviewed independently by learners.

Promotional material

Promotional material includes publications, leaflets and brochures for external customers, such as point-of-sale materials, detailed catalogues for sales staff and leaflets for mailing. Such materials for external distribution must comply with the organisation's guidelines for communication. This may include the kind of language that can be used, marketing messages, the positioning and use of graphics, colours and logos, and legal approval.

Large organisations may also produce these materials for internal purposes; for example, updating employees about a change to the equal opportunity policy by including material in employees' payslips. If your organisation uses such materials, it is likely there will be a template and approval process for them, which you should follow.

Promotional materials often have a lengthy production period, which you should include in your planning schedule.

Reports

Reports are used to distribute detailed, sometimes complex information to a wider audience. Some of the many types of reports include sales performances, customer satisfaction surveys, feasibility studies, research results or annual reports. Reports may also be used to document the results of an activity, such as a research project or a visit to customers in a particular area. Reports may be external or internal and often have to be prepared in a specific format as indicated here.

External reports

Large companies may publish their annual reports, and some other reports, externally. These reports will almost certainly follow a template, which will guide both the content and appearance of the report.

Internal reports

Internal reports may also have templates. For example, if each region is producing a sales report, it is much easier for management to review and compare them if they are all presented in a similar way. It's also easier for staff to prepare them if there is a structure to follow.

Report formatting

Use headings, numbering, graphics, tables, lists and other devices to help make details more readable. It's easier to digest information presented in several different ways than 10 pages of solid text. It's also important to present an executive summary of the key findings at the beginning of the report.

Speeches and presentations

You may be required to prepare a speech that you, a manager or a work colleague, will deliver. Speeches may be delivered to groups of employees, customers, suppliers, the press, learners or any of a number of groups. You should generally know the forum in which the speech will be delivered before you are required to write it, and this will heavily influence what you include, as shown here.

Writing speeches for others

If you are writing a speech for someone else to deliver, it's important to consider their personal style. A naturally retiring person may not feel comfortable opening with a joke, while others deliver this with ease. Make time to meet with the person and understand their preferred style before writing the speech.

Formal speech protocols

Formal speeches may have protocols to observe, such as recognising distinguished members of the audience, acknowledging Indigenous owners, thanking sponsors or other such requirements. Your organisation may also have some guidelines about language, style and structure of speeches.

Speech presentations

Presentations may accompany some speeches. These are often created with software such as Microsoft PowerPoint. Your organisation may have design templates that are used for presentation and govern the colour of slides, font, layout of graphics and so on. There may also be requirements to include logos and marketing messages in these presentations.

Speech presentation formatting
Limit the information displayed on each slide to help the audience focus on the speaker while retaining key points. Consider the following: • Use a sans serif font; for example, Arial. • Use a large font size, not smaller than size 28. • Limit slide text to five main points only. • Keep bullet points short and in the same grammatical structure.

Submissions and tender documentation

Organisations offer formal requests for tender to potential suppliers, which clearly outline product or service requirements, as explained here.

Submission inclusions and detail

Suppliers submit tenders for the business, or formal replies, which should include all requested information such as price, delivery timing and quantity, and may also include information about the supplying company. Both documents require a high level of accuracy and specific detail.

Research and submission requirements

You may need to research quite widely the information required for tender documents. Tenders are often governed by strict time lines, to ensure consistency between potential suppliers. You may need to follow a standard template, and to secure internal approvals before sending the submission.

Public notices

Public notices are used when an organisation has an obligation to inform the public of a particular action; for example, a council may have to provide a public notice of a proposal before it is implemented to provide the residents with an opportunity to object. Many government organisations, whether local, state or federal, are subject to these requirements. Private organisations may also be required to issue public notices about their plans or proposals where they may affect the surrounding residents.

Since public notices are often a legislative requirement, it's important you carefully research and comply with any guidelines and use templates as required. As this is for external communication, you must also follow any internal approval procedures.

Website text

Most organisations now display information on their websites. This is a cheap and effective way of communicating to the public. You can upload an existing document, such as an annual report, or you can develop something specifically for the website.

There are specific guidelines which need to be observed for website information, and tender information needs to specify what is required as identified here.

Provider's requirements

If you are developing material specifically for the website, then you should follow the guidelines set by the web provider. Some of these will influence the technical aspects of the document, such as file size, type of graphics and so on. Website text is often quite different in style from other written forms and readers tend to scan material and read on screen, rather than print and read in detail. Other guidelines may influence the actual language, fonts and logos, layout and brand presentation. Websites are an increasingly important aspect of an organisation's image, so it's important to comply with these guidelines.

Tender requirements

Some common guidelines include the following:

- Place critical information near the top of the page.
- Present information in shorter paragraphs than for print materials.
- Present information to minimise scrolling.
- Use a sans serif font in 12-point or larger font size.
- Use bold or italic to highlight key points.
- Use bullet points, lists and graphics to summarise information.

Practice task 2

1. Some organisations have an accepted house style. What is a 'house style'?

2. To protect the privacy of your clients, would you place their email addresses in the 'cc' or 'bcc' field?

continued ...

... continued

3. Why is it important to carefully research and comply with any guidelines and use templates for public notices?

1C Establish the means of communication

After determining the purpose and choosing the format of your document, you will need to decide the most appropriate means of communication. You will most likely be familiar with the software applications in use at your organisation. Many organisations use the Microsoft Office suite, including Word, Excel, Access and PowerPoint. Other applications may include Adobe FrameMaker or InDesign.

Most people are familiar with word processing applications. While these can manage the different heading styles, font types and pictures that may be used in promotional material, the documents tend to become large, awkward files. Desktop publishing applications contain tools much better suited to promotional materials, particularly brochures, newsletters and so on.

Common applications

Here are the more common Microsoft and Adobe applications used in producing documents.

Microsoft Word
• Word processing application • Used to produce text, or text and some imported graphics/tables • Used for business letters, manuals, instructions, procedures, reports and speeches

Microsoft Excel
• Spreadsheet program • Used to calculate and present figures and graphs • Used for reports, client and product details

Microsoft Access
• Database application • Used to manage detailed analyses • Used for input for reports, client and product details

Microsoft PowerPoint
• Presentation program • Used to visually present information and notes for distribution • Used for presentations using projector and as accompaniment to speech

Microsoft Outlook
• Email program • Used to send emails, manage contacts and calendars • Used for business emails

Microsoft Publisher
• Desktop publishing program • Used to create materials requiring a mix of text and graphics • Used for promotional materials

Adobe InDesign
• Desktop publishing program • Used to create materials requiring a mix of text and graphics • Used for promotional materials

Adobe FrameMaker
• Desktop publishing and word processing program • Used to create materials requiring word processing and a mix of text and graphics • Used for promotional materials, reports, manuals, instructions, procedures

Use additional applications

While the final document may be created in one application, you can use additional applications to prepare support materials. For example, tables and graphs created in Microsoft Excel can be imported to a Word document to support the text. Speeches written in Word may be accompanied by a PowerPoint presentation. PowerPoint has a function to add notes at the bottom of each slide and print a copy for the presenter.

Choose an application

If you are distributing electronic copies of a document, then consider whether your software application or your version is compatible with the recipient's system. You may need to save a file in an earlier version of a common application, or use a universally available application such as Adobe Acrobat. PDF (portable document format) documents are often smaller files and less prone to carrying computer viruses, which also facilitates electronic distribution.

The application you choose will depend on a combination of:

- the purpose of your document
- the format of your document
- the applications available at your organisation
- your own skills and preferences
- the needs of your audience.

Templates

Most software applications allow you to create templates, so you can easily replicate documents. Templates allow different users can create documents that look the same. This improves the professionalism of documents, and also helps the audience as it becomes familiar with the way information is presented.

You can save Microsoft Word documents as templates, allowing you to set features such as heading styles, headers, footers and page numbers, and summary features such as a table of content, an index and a list of tables. Likewise, you may set up a template in Microsoft PowerPoint, which dictates the background colour, the heading and text styles, and suggested graphics layouts.

If you will be creating complex documents regularly, it's worth completing specific training in the software applications you will use. Many of these applications have advanced features that allow you to create consistent, professional-looking documents, and save you time once the templates are established.

Example: prepare a submission

The following explains how Simon needs to prepare a submission for the chain of automotive repairers.

This potential client has asked for a presentation of Simon's submission, rather than just an electronic document. Since he and Jesse will attend in person, Simon decides to prepare a PowerPoint presentation to accompany the formal submission. That way Jesse can deliver the presentation, and then leave copies of the submission for Natalie, the purchasing officer. Natalie has requested both printed and electronic copies of all materials.

Simon can also create a PDF copy so Natalie can access the file without using PowerPoint. Simon also asks the production manager whether it will be possible to provide some sample uniforms with the potential client's logo. It's helpful to use physical items in a presentation, particularly when pitching for business, as this provides a very clear picture to the audience.

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Practice task 3

Conduct some research into slide presentation software applications. List five features of slide presentation software that help to communicate topics to audiences.

1D Determine document requirements

As part of the document planning, it's important to understand what requirements there may be. Document requirements may include content, style, general standards or file inputs, as described here.

Content
You may need to comply with internal or external reporting guidelines, to meet audience needs, or to meet legal guidelines.

Style
You may need to comply with internal style guides, templates, or branding guidelines, or to write in a particular style to suit audience requirements.

General standards
You may need to comply with protocols on footnotes, citations, references and so on.

File inputs
To facilitate later formatting of the document, you may need to collect inputs in particular file structures or with specified resolution levels.

Content requirements

Content requirements can be quite specific. Here is a list explaining some of the requirements you may encounter.

Compliance with genre
Some documents need to comply with general requirements based on what type of document it is. For example, annual reports for large companies generally include a financial summary, financial reports, a letter to shareholders, information on company operations and significant developments, and information about company officers and directors

Reporting requirements
Your organisation may have made some commitments about the type of reporting it will do, perhaps to achieve a certain external certification, or as part of a public commitment. If your organisation is ISO certified, it will need to maintain standards of documentation as part of the certification. Some government contracts require regular milestone reporting, in a specified structure, with which suppliers must comply.

Organisational guidelines
Your organisation may have documented policies, procedures and work instructions about producing documents, depending on their purpose. For example, there may be guidelines about producing training material to ensure training sessions comply with WHS guidelines, or procedures governing your own work practices to minimise the impact on your wellbeing.

Legal requirements
Some documents may be subject to legal requirements. For example, promotional material often requires disclaimers that provide specific information about availability or product features, to ensure compliance with consumer standards. Some external documents may be subject to legal review before they are circulated. It's important to clearly understand your organisation's procedures as there may be adverse consequences.

Traditional requirements
Traditional requirements may include conforming to a particular style or structure, as the audience is used to receiving information in this way. For example, internal funding requests may have a particular sequence because the approving manager has asked for all requests to be prepared in the same way.

Organisational style requirements

Your organisation may have specific templates, which may specify style requirements, or they may be pre-structured documents, into which you just have to put the specific information required for your report.

There may also be standardised reporting requirements for particular departments, or for certain types of documents. These will generally influence the content of your report. For example, they may require that a quarterly presentation to all employees about the business status includes a financial summary from each department, a list of key achievements, welcomes to new employees, recognition of long service awards and a summary of market changes.

Style guides may include guidelines on all or any of the following:

- effective and inclusive language
- grammar
- spelling and punctuation
- capitalisation
- textual contrast
- abbreviations
- numbers and measurement
- citation methods
- copyright.

Use a style manual

Government departments generally require documents to follow the Commonwealth Government's Style Manual. This book is also a good reference if your organisation doesn't have its own style guide. The Manual is available from John Wiley & Sons, Australia Ltd at: au.wiley.com/WileyCDA/WileyTitle/productCd-0701636483.html.

Example: use bullet lists

The following example shows how the style guide for an organisation producing training materials may instruct employees to use bullet point lists.

Bullets, rather than numbers or spaced hyphens, are used to list points. A colon or full stop should introduce the points; a colon is preferable because it links the lead-in sentence with the list that follows. Consider the following guidance.

Full sentence lists

If each bullet point is a full sentence, and does not complete the lead-in sentence, the points should begin with a capital letter and have a full stop at the end of each.

For example:

The Board made the following recommendations:

- All staff should have six weeks holiday a year.
- All salaries should be increased by $8,000, effective immediately.

Run-on lists

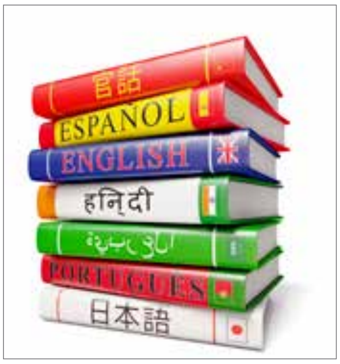
If the list comprises part of an overall sentence (a run-on list), begin each point with a lower case letter and complete the list with a full stop (or a question mark if the list is part of a question). For example:

Kim wanted Kevin to:

- research
- study
- practise.

Do not use punctuation after each bullet point in a run-on list, with a full stop at the end of the last point if the list completes the lead-in sentence.

Language requirements



Depending on your audience, you may need to consider producing your document in languages other than English. This may be common in large manufacturing companies in which a significant portion of staff do not speak English as their first language.

Unless you have the skills to translate it yourself, you may need to include translation of materials in the budget and time line for developing your document. Alternatively, you may choose to write your document very simply for those who don't speak a lot of English.

Writing styles

All documents should aim to use clear, simple language, regardless of the English-language skills of the audience. Some documents must include technical information, and therefore cannot avoid including jargon. Nevertheless, you should minimise this wherever possible, particularly if some members of your audience don't have the technical expertise.

Common guidelines for using simple English

- Use active rather than passive language; for example, 'John wrote the document' rather than 'the document was written by John'.
- Use inclusive language; for example, use 'they' rather than 'he' or 'she' and avoid discriminatory language.
- Use short sentences with one main point.
- Vary sentence and paragraph length to improve readability.
- Avoid repeating content unnecessarily.

Point numbering systems

When planning a structure for your document, you may divide it into different sections. These sections may then have further subdivisions. Your organisation may have preferred methods of indicating these sections, as listed in the following. Heading hierarchies can generally be set up in a document template, and can also incorporate a numerical or alphabetical system. This is a very useful way to create consistency, save time, and help structure contents tables and indexes.

Heading hierarchies

Different font styles and sizes are used to differentiate headings for each section.

For example, chapter headings may use a large, bold font, and be designated 'Heading 1'. Section headings may use a smaller font, still in bold, and be designated 'Heading 2', while lesser headings may be distinguished with italics.

Numerical systems

A sequential numbering system used to differentiate sections.

For example, indicating the first chapter as number 1, the first section as 1.1, and so on. Some systems combine numbers with roman numerals; for example, a list in section 1.1 may be denoted with i, ii, iii.

Alphabetical systems

Alphabetical systems are generally used together with a numerical system to denote a lesser section.

For example, Section 1a and so on.

Document extents

Different documents may be subject to word limits. Promotional materials may be limited to a number of pages to minimise printing costs. Some reports or internal documents may have page or word limits, to help with management review, such as requiring single-page summaries as a cover to funding requests with supporting appendices. Submissions for newspapers or magazines are often charged according to word length, so it's important to understand this at the planning stage.

Reference standards

Different disciplines and organisations can have quite specific requirements for referencing other work. Since these may be very specific, it's important to verify at planning stage what information you should record when collecting inputs for your document.

Plagiarism is using someone else's work without acknowledgment and presenting it as your own. Consequences can range from discrediting academic work to copyright concerns. Acknowledge any material you use in your document. You should be familiar with common methods of creating a bibliography, footnotes and endnotes, particularly if you prepare formal, detailed research reports. The difference between different ways of acknowledging your sources of information is here.

Bibliographies

Bibliographies provide a list of the references used throughout the document. The Harvard (author–date) and the Oxford system are commonly used methods.

Citations

Citations are short details about the reference used within the text of a document. Full details of the reference are included in the bibliography.

Footnotes

Footnotes and endnotes are used to either provide further information, such as legal disclaimers, or to provide bibliographical information. Footnotes are located at the bottom of each page, while endnotes may be included at the end of each chapter, or the whole document.

Acknowledgments

Acknowledgments are used to recognise particular contributions by individuals and organisations. These are usually placed at the start of a document.

Catalogue standards

Long and complex documents with extensive sections, numerous tables or figures may require a table of contents for the sections, a list of tables or figures and a complete index to facilitate searching for information. Understanding these requirements at the planning stage will help you structure your document to facilitate this. Microsoft Word has several tools that, if you label sections, figures and tables appropriately, will create a summary list that automatically updates page numbers.

File types and sizes for online documents

Documents that will be published online often have specific file requirements. In general, these requirements relate to file size. If a file is too large, it takes too long to display on websites. Here are some common file types you may encounter.

Common online file types
JPG files are used for displaying photos online. A medium quality JPG file will have good colour and clarity but not be too large.
PDF files display large files, generally created in another application, with less file size and no editing function. They are created in Adobe Acrobat.
TXT files are compact and widely compatible files used where complex formatting and graphics are not required.
ZIP files are files of various types that have been compressed using WinZip. This application is also required to open the files.
Some other file types commonly used are Adobe PostScript, Lotus files, Microsoft Office suite files, and RTF (rich text format) files.

Artwork requirements

Graphics, photographs, illustrations, charts, maps and other illustrative materials may be used to explain text. Depending on how the final document will be distributed, you may be required to collect the artwork in different formats. Researching this at the planning stage will save you time later on.

Some professional applications have specific file requirements. Professional printers may have quite rigid requirements about how proofs should be presented, image resolution, input on colours to be used and so on. You may incur cost for modifying files if they are provided in the wrong format, so check carefully before collecting your material.

Time line requirements

You will usually be advised of the deadline for your document. If not, you should clarify this. You should also clearly understand what this deadline means. For example, printed promotional materials have a reasonably long lead time. If the deadline you are given is for the date of distribution to the end customer, then you need to develop interim milestones to ensure you meet this date. Your organisation may have additional procedures, so make sure you consider these when developing your time line.

Some considerations for setting interim milestones include:

- gathering source information
- receiving internal approvals
- obtaining legal approvals of final text
- editing and proofreading
- formatting of documents
- obtaining approvals of format and layouts
- printing of documents
- distributing documents.

Example: plan a submission

The following demonstrates how a team member determines timing requirements for a submission.

Simon reviews the request for tender from the chain of automotive repairers. There is a section in the request that specifies that they must provide information including the design cost, cost per uniform at various volume levels, range of uniform sizes and materials used in each type of uniform. Simon must also include delivery lead times for initial and subsequent orders and the exclusive use of colours for the potential client. Simon decides that he will adopt this structure for his submission.

Simon has to get his plan and schedule to Jesse for review within the next couple of days if he is going to get the document to Natalie in time, since Mario, the production manager, is often slow at providing information. Simon asks Jesse about any other requirements before making final plans for the submission.

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Practice task 4

1. As part of the document planning, what four categories of requirements must you take into consideration?

2. List five considerations for setting interim milestones during the document planning phase.

1E Determine content and order

An important part of planning your document is to determine what you will include, and in what sequence. Considering this in the planning stages helps you identify any information you may need to request from others in your organisation, ensures that your document flows smoothly and helps you manage milestones and time lines. Here are some things to consider when planning your document.

Document structure considerations

How you structure your document will vary considerably depending on its nature and overall content. Some information on the sort of things you may include is provided in the following sections. Not all of these elements will be included in every document.

Document structure variations

There are endless variations on document structure. Ensure that your document presents information in a logical fashion that is appropriate to the reader's level of expertise. New information should be introduced in a clear, logical manner.

Content and order planning

Depending on the nature of your document, you should discuss your planned structure with the person who requested it. Getting some preliminary feedback at this stage will give you time to collect any additional material, and you will avoid developing unnecessary material.

Arguments and rebuttals

For some documents, such as reports, presentations and publications, you may need to present different views about a subject. Here are the different ways you can present a variety of perspectives on a topic.

Presenting arguments

You may be preparing a report about possible reasons for a decline in business, in which case you could present a series of views or arguments about why this is so.

Using rebuttals

Rebuttals are used to counter a particular argument. They are often used in persuasive documents. Depending on the objective of your document, you may present the rebuttals to each argument.

Presenting options

Arguments and rebuttals can also be used when presenting a proposal with several options. A simple method is to create a list of options in a table, with columns 'For' and 'Against'. This allows the reader to assess the worth of each option.

Persuading the reader

If you are presenting a series of views, but hoping to persuade the reader to support one particular view, it's best to present the alternative views first, together with their rebuttals, and conclude with your preferred view.

Different sequences

Some documents may adopt a more fixed structure. Documents may have chronological, alphabetical or operating sequences, as shown here.

Chronological

Some reports may use a chronological sequence, either throughout the document or in key sections. A research report may begin with a summary of the research, key findings, and methodology, then proceed to a chronological reporting of the research, then finish with conclusions and recommendations.

Alphabetical

Alphabetical sequences may be used for documents that have a reference function, as information is easy to find. Training manuals or reference documents for new employees about different forms used in the organisation may follow this structure.

Operating

Documents for work instructions and procedures will most likely adopt an operating sequence; that is, they will mostly follow the order used in the procedure, with preliminary sections explaining the purpose of the document, key terms, related documents and so on.

Conclusions and recommendations

Some reports are designed to communicate a series of events, which are then used to develop conclusions and recommendations. Examples of such reports include customer research reports, feasibility studies, client visit reports or consulting projects.

A research report may take the following approach:

- Design an experiment or survey, which generates a series of facts and observations.
- Develop some conclusions based on this data.
- Use the conclusions to make recommendations about a future course of action.

Illustrative case studies and other examples

Case studies and examples are most frequently used in training materials, or presentations that aim to inform or train the audience. Case studies may provide practical examples of using a particular technique, similar to performing a role play. They can also reflect recently introduced content in a familiar context, such as demonstrating a sales technique using one of the organisation's main products.

The following contrasts case studies with use of examples.

Case studies

Provide the case study, then follow with supporting text that establishes the link between the case study and the recently introduced material. Research reports may summarise key findings, then present case studies of particular customers to illustrate the point more clearly and to provide context for the audience.

Using examples

Examples are generally less detailed than case studies, and should show something that's quite familiar to the audience. They are also used within the general text, while case studies are often presented towards the end of a section.

Link ideas

Complex documents often present a lot of different information, which can become quite difficult for the audience to follow, particularly if it's a long document. It is helpful, therefore, to structure documents so that similar ideas and concepts are presented together, as shown here.

Grouping ideas

You may group contrasting views of a similar concept together. You may present one side of an argument in some detail, then follow it with an alternative view. You may decide to compare the two views either as you explain the second view, or as a subsequent section.

Using topic sentences

Use topic sentences within a paragraph to indicate the main point of that paragraph. This helps restrict each paragraph to one key idea, which is easier for the reader to follow. Clear topic sentences will also help you group together a cluster of similar paragraphs, which together may form a section of your document.

Recommendations and supporting arguments

Documents that make recommendations may include, but are not limited to, business letters, manuals, publications, reports, speeches, presentations and submissions. Recommendations are often summarised in a designated section towards the end of the document. It's important that the body of the document includes any information required to support the recommendation, or the audience will not be persuaded to adopt the recommendation.

It can be helpful to both open and close a document with the recommendation. For example, you may explain that the purpose of the document is to recommend building a new warehouse. Your document would then proceed to explain the current issues and their impact on workers and performance, perhaps some information about the cost and payback period, and then conclude by recommending the readers adopt your proposal.

Traditional categories and sequences

Different documents may have a traditional sequence or categories included. This may be a preference within your organisation or by common practice in the broader community.

A proposal for management approval may include the following sections:

- objective of paper
- summary of proposal
- background
- financials details of proposal
- timing
- resources
- recommendation.

Practice task 5

1. Is the following statement true or false? Arguments are used to counter rebuttals in a report.

2. Is the following statement true or false? Operating sequences may be used for documents that have a reference function, such as with training manuals.

1F Develop an overview of structure and content

By this stage of the planning process, you should have a fair idea of the proposed content of your document. You can now begin to plan the document in greater detail, designating the different sections, what content will be included in each section, how it will be formatted and so on. Creating a mock document or 'control' can be helpful at this stage.

Formatting style guidelines

You may be required to follow particular formatting styles for different reasons. While this is important, you need to create a balance between the formatting requirements and the readability of your document. Here are some styles you may come across.

Enterprise style guide/house style
If the style guide for your organisation emphasises the format, layout and appearance of a document, then it may be helpful to create a small portion of the document for internal review and feedback before continuing further. This provides the opportunity to verify that you have correctly understood the requirements before you spend considerable time formatting the document. If the document is formatted by other employees or an external company, this may not be required. Your manager should be able to advise you on the house style for your organisation, or there may be an organisation style guide available as a reference.

Readability of the document
Readability refers to the reading ease of a document. Research shows that documents with a high level of readability improve comprehension, retention and reading speed. It's therefore important to aim for a high level of readability in your documents. There are a number of different systems to measure readability. These systems assess the sentence length, the average number of syllables per word, and the number of sentences in the document. These results are put into different formulae to create a readability score. Microsoft Word can be configured to provide a readability score when performing a grammar check, using the Flesch test.

Using plain English

Using simple English will help improve the readability of your document. Some common guidelines for using simple English include the following:

- Use active language rather than passive language.
- Use inclusive language and avoid discriminatory language.
- Use short sentences with one main point.
- Vary sentence and paragraph length.
- Avoid repeating content unnecessarily.

Formatting and document appearance

Depending on your organisation's structure and procedures, you may not be responsible for formatting the final document. If someone else will format the document, then you should ensure that they are aware of any organisation requirements, such as those contained in the style guide or any other workplace policy or procedure.

If you are responsible for formatting the document, you should be guided by the organisation requirements or the style guide. If there are no guidelines in place, then spend some planning time considering your format so you can use it consistently throughout your document.

Some elements to consider include:

- font styles for standard text, headings, subheadings, emphasising text, creating case studies, introducing new terms and so on
- headers and footers including document references, logos, copyright messages and so on
- labelling of graphics and other illustrations
- spacing between paragraphs, lists and sections to provide white space
- use of borders, break-out boxes and other emphasising tools.

Document templates and styles

Many organisations develop document templates that are used as a standard for all written texts (for example, letters, reports, emails). The templates contain prescribed styles, which are applied to the features of a text document. Often, the styles are set up with corporate colours and are designed to create a consistent overall presentation for all communications. Styles not only determine the font type and size, but are also formatted to include space before and after, indents, bullets and numbering attributes for each feature.

In addition to having consistent styles, the use of templates with prescribed margin sizes and spaces between the paragraphs determines the amount of white space that in turn enhances the readability of the document.

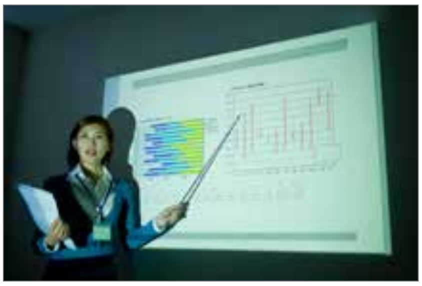
Here are some examples of styling features and their use.

Headings
Headings are used to introduce a segment of text. They are useful for organising information and for creating a summary of the overall document content.

Fonts
There are many different fonts or typefaces that can be used in documents. While a mixture of fonts is usual in a document (for example a heading is styled differently to the body text), too many different fonts can make the document difficult and confusing to read.

Bullets and numbering
Bullets are used to outline lists or processes. Using consistently styled bullets makes a document easier to follow.

Structure documents for verbal delivery



The structure of presentations, training material, speeches and other verbally-presented documents may be influenced by the time available to deliver them. For example, if you are planning a presentation for a group of employees as part of a conference, you may need to consider the start and finish times, rest breaks, an ice-breaker or energising activities, and organisation requirements for work periods.

It's also important to remember that, unlike with written documents, the audience cannot read over a section that is complex or confusing. You should structure your material so that the speaker provides an outline of what to expect, explains the material, then recaps the material. In other words, tell the audience what you are going to say, say it, then tell them what you said.

Create a control document

A control document is a mock copy created when planning a complex document. Write brief notes on what you want each section to convey. Include details of any graphs, photos, or illustrations you may require, perhaps even with a brief sketch. Then, as each section is developed, replace your notes with the draft or final version. The purpose and way to develop a control document are both shown here.

Purpose of a control document

Creating a control document is a helpful way of identifying exactly what work you need to do, and how far you have progressed. It also means you can quickly demonstrate progress to a supervisor or manager, easily identify any gaps as the deadline approaches, and allocate work when the document is being completed with other people.

Develop a control document

Imagine you are developing a major presentation for your manager to deliver to a group of suppliers. During your briefing discussion, you might take a series of notes about their requirements. As part of your initial planning, you might create a control presentation in PowerPoint which you could review with your manager, for their feedback and approval. You would then update the file with the correct template, the final text, supporting comments for your manager, graphs, images and so on.

Work effectively in your office environment

Your organisation may have guidelines about work practices that influence how you create your documents. These may include how to set up your work environment to reduce the ergonomic impact of creating long, complex documents. To minimise the impact on your wellbeing, consider the following suggestions about positioning office furniture and equipment.

Office furniture and equipment positioning
Adjust chair height so that your feet are flat on the ground or a footstool.
Adjust desk height so it is just below elbow height.
Position the keyboard as close to you as possible so you can type without resting your wrists.

Position the mouse next to your keyboard on your preferred side, letting the desk support your wrist (not your arm). Alternate sides if you use the mouse frequently.

Position the top of the monitor at or slightly below eye height and at around an arm's length from you.

Vary the type of tasks you work on throughout the day, breaking up tasks like data entry or writing up reports, taking regular breaks and performing stretches.

Work sustainably

Another organisation guideline about work practices that influence how you create your documents may relate to 'green' office policies and procedures aimed at reducing the environmental impact. All employees can contribute to reducing the environmental impact of our daily activities, both at work and at home. Your organisation may have green workplace policies and procedures, which you should follow. If not, consider adopting some of the following strategies.

Sustainability strategies
• Adjust your printer settings so double-sided printing is the default setting. • Use recycled paper wherever possible. • Encourage recycling by positioning recycle bins near workstations, shredders and photocopiers. • Reduce energy usage by switching off lights and computer monitors not in use, and using power-saving options on office equipment.

Practice task 6

1. List two advantages in creating a control document during the planning and development phases.

continued ...

... continued

2. Identify two sustainability strategies to ensure the effective use of resources in your organisation or in one with which you are familiar.

Summary

1. Writers should determine the purpose of a complex document by clarifying the audience, the presentation forum, the expected outcome and the expected length of the document.
2. There are many different document formats, including detailed business letters, emails, instructional material, promotional material, reports, speeches, presentations, tender submissions, public notices and website text.
3. Each document format may have different requirements about their content, style, or general standards such as referencing and cataloguing. Your organisation may detail specific requirements in a style guide, which you should follow carefully.
4. Research file input requirements carefully during the planning phase to ensure you provide documents in the appropriate format.
5. Document structure should be appropriate to the type of document and the presentation forum.
6. A control document is a helpful way of planning structure and content of your document.

Learning checkpoint 1
Plan documents

This learning checkpoint allows you to review your skills and knowledge in planning documents.

Read the following, then complete the tasks that follow. Retain your work to use in later assessment activities for this unit.

- Plan the training material for a three-hour seminar on a subject of your choice. You should choose a subject in which you are reasonably expert; for example, about your favourite sport, hobby or interest. The seminar will be targeted at beginners in the subject, who may be of any age group. There are no pre-requisites for attending the seminar. A classroom, projector, and support materials such as flip charts will be available. Practical equipment may be available on request.
- Choose an organisation for which you will prepare the material. You could use your workplace, training organisation, or an organisation with which you are familiar, such as a government agency, and could access information about their requirements.

Part A

Briefly outline the purpose of your document, identifying:

- what the document was prepared for
- information related to the intended audience
- the presentation forum
- the outcome/s and expected length.

Part B

1. Explain how you will present your training document(s), including:
    - format
    - means of communication
    - organisation requirements.

2. In preparing your training materials, what WHS and sustainability requirements should you take into consideration?

Part C

What elements should be incorporated in an effective control document to clearly indicate your intended content, structure, format and layout?

Topic 2
Draft text

Now that you have planned your document, you need to begin processing the material. As you receive or collect material, you need to review it carefully, ensuring that it meets the purpose of your document. It's important to assess the information as you collect it, so you can interpret it, draw conclusions about any data, and start to consider how it can best be presented. This process will help you develop clearer, more concise text and a more effective document.

In this topic you will learn how to:

2A Review and organise material

2B Prepare text

2C Include graphics

2D Identify and fill information gaps

2E Draft text

2F Use appropriate language

2A Review and organise material

During the planning stage, you should have decided upon a structure for your document, based on its purpose, proposed format and audience. Your control document is a good tool for deciding which information to present in which section of your document.

Many documents need information gathered from different sources. As this information becomes available, review it to confirm that your chosen sequence and intended format is still appropriate. This section discusses some steps for this review.

Allocate and review information and structure

Here is the process to use to allocate information, review data and review the document structure.

Allocate the information

You should have a designated section within your document for each piece of information you collect. If you receive new or unexpected information, then review your structure for an appropriate location.

Review the data

Assess the relevance and completeness of the information you have received. Does it contribute to the document purpose? If not, discard it, otherwise it will distract the reader. If the information is incomplete, or requires further support, then update your control document and source the information.

Review document structure

Review each piece of information in the context of your document. Does it support your intended structure or do you need to make modifications? You should aim to present information in a logical sequence that will be easy for your audience to understand and is consistent with their level of knowledge on the subject.

Example: review and organise material

Here is how Simon reviews and organises his information for a tender submission.

During his meeting with the product manager, Mario, Simon receives the information he requested about costs, lead times, and sizes available. Mario seems confident he can provide a uniform sample for his presentation, but has not collected the information on costs. Simon needs this information so he can ask the finance department to create customer pricing; Mario agrees to provide it the next day.

When Simon returns to her desk, he opens his control document and allocates the information Mario has provided about uniform sizes, options and materials. He checks this against the request from the client, and is relieved to see that the requirements are covered. He also allocates the information about lead time for orders, and makes a plan to photograph the samples for inclusion in the printed submission.

Practice task 7

1. Why should you discard information that does not contribute to the document purpose?

2. What is the purpose of reviewing your document structure at this stage of development?

2B Prepare text

Having reviewed your information, you should now begin to prepare the supporting text. This involves interpreting the information, and briefly summarising the key conclusions it offers. Clarifying the key information before writing the draft text will help make it clearer and more concise. The following outlines the process for preparing text.

Preparing text

Interpret the data. Review the data you receive and understand what it is telling you. It's more useful to know that customer satisfaction has improved five points to 56% compared to last year, than to know that customer satisfaction is 56%.

It's best to delay writing text until all information is available, as you will be able to consider all information in your supporting text. Write brief notes on the data and information, the key conclusions it suggests, and what you expect to write.

Use your interpretations and your key points to help you decide how to present this information. For a product brochure, for example, you may choose some suggested photos to support your key features.

Reviewing and interpreting technical information may help you decide how to prioritise subject matter for a workshop training manual.

You may receive the technical information, review it, then choose the key learning points for detailed discussion and practical exercise.

Example: prepare text for submission

Simon has received the recommended pricing structure from the finance department. He develops a table summarising the price by model line, and for the different alternative uniforms they are offering. After checking that the table covers all information Natalie requested, he includes it in his control document. Since pricing is a critical decision, he forwards this table to Jesse for review and approval before he completes the document. Here are the steps taken within this process.

Supporting his case

To support the case that his company is a supplier of choice, Simon is collating information about their customer satisfaction performance compared to industry standards. He reviews the latest customer satisfaction results, as well as their performance figures, and makes some notes about how this reflects their superior performance. He sketches some column graphs to present the information. Having clarified the graph structure in his mind, he creates the graph in Microsoft Excel.

Reviewing information

It's prudent that Simon asks his manager to review pricing ahead of the whole document, as it could take time to resolve any concerns with the finance department, and he has a fixed deadline for submission. Interpreting customer satisfaction and performance information allows Simon to choose which elements to highlight in his graphics, while sketching a graph before creating it can save time in structuring data to create a graph in applications such as Microsoft Excel.

Practice task 8

Place a number in the column next to each step in **the following table** to indicate the order of steps you would follow when preparing text.

Steps in preparing text	Correct order for each step
Review information	
Write brief notes	
Interpret data	
Develop graphics	

2C Include graphics

Different people absorb information in different ways. Some people are auditory learners; that is, they take in information through listening, and absorbing the context of how it is presented. Visual learners are helped by visual representations and may be more likely to think in pictures. Tactile (or kinaesthetic), learners need to experience what they are learning, so learn best through activities or role-play.

Because people take in information differently, it's important to use a variety of methods to present complex information. Including some visual representation of data, whether a graph such as a bar or pie chart, photograph, illustration or summarising table, can clarify information in a way that supporting text cannot. Graphics should be used together with text to present a complete picture that caters for all types of learners in your audience.

Types of graphics

Before deciding on your graphic, it's important to be clear about what the information is telling you. Review the key points you wrote when organising your information. Often, this will help you decide what sort of graphic to use. Ensure your graphics actually serve a purpose and are not simply to beautify your document. Some suggestions for how to use different graphics are given in the following.

Diagrams
• Represents a concept • Used to show prioritisation of tasks in a training manual

Photos
• Represents actual situations; show product features • Demonstrates product features in a tender submission; demonstrate current situation in a client visit report

Clip art and illustrations
• Adds visual interest; to represent a concept • Supports bullet points in a PowerPoint presentation to staff; support explanations in a training manual

Tables
• Summarises detailed information, particularly when there are different measures • Provides detailed specifications for a range of products

Flow charts
• Shows a process or sequence of event • Summarises a reporting process in a training manual

Column graph
• Compares data across categories • Compares expenditure versus budget in different departments

Line graph
• Displays trends over time • Different lines may represent different regions or products

Pie chart
• Displays contribution of each category to the total; use when values can be added or there is only one series, all with positive values • Represents customer satisfaction results by level of satisfaction

Scatter (or X–Y) charts
• Compares pairs of values; to demonstrate correlation between two factors • Shows relationship between experience of employees and customer satisfaction result

Bubble chart
• Compares three series of values • Show relationship between experience of employees, customer satisfaction result and sales performance to target

Combine graphics

Some types of graphs can be effectively combined to represent more complex information; for example, a column and line graph may be combined. This often requires using different scales on two Y-axes as shown in the following example. The column graph represents sales by region, with a dollar figure on the Y axis, while the line graph shows market share, requiring a separate Y axis on the right-hand side to show percentages. Use these kinds of graphs selectively, when you know that you can explain them clearly to your audience, or they are familiar with this kind of presentation.

Example: include graphics

The following demonstrates how Simon uses graphics to present his information.

Tables and photos

After some negotiation, Simon receives the agreed pricing for his submission. He enters the changes to his table, checking them carefully, and updates the table in his control document. Simon is still waiting for the sample uniforms Mario has promised, so he cannot photograph them for inclusion in the final submission. He updates the control document with the date he expects to receive the samples, and his plan to have a marketing contact photograph them the following day.

Column graph

After discussion with Jesse about some of the standard information included in a tender submission, Simon is adding to his submission a section that provides information about the company performance compared to industry standards. As part of this, he prepares a column graph that the organisation's performance as one series, and the industry average as another, which Jesse will discuss as part of the presentation.

Practice task 9

1. To represent a process, what type of chart would you use?

2. When would you use a clip art image?

2D Identify and fill information gaps

Review your control document and assess whether you have everything you require. You may find that, even though you have received all the inputs you requested, there are still some gaps in the information. For example, you may be developing a proposal for management approval for a new piece of equipment. After reviewing your control document, you may decide that there is insufficient information on the inefficiency of using an outdated photocopier that regularly jams, and decide to include an estimate of time lost per week.

You may find that some of the material you requested from other employees is still pending. You should remind these employees of your request, perhaps providing information about when your document is due and how their delay is putting your document at risk.

Request information

Requesting information from others can be tricky, depending on your relative position and influence in the organisation. If you are meeting resistance from your peers, you may need to speak to the appropriate manager or supervisor for assistance. It's courteous to inform someone's manager if you have asked them to complete a large piece of work.

In most organisations, there are a range of people you could ask for information, some of whom are outlined here.

Colleagues or team members

Usually within your own area, and can be approached directly. May have more information or experience, better data presentation skills, or some time available to assist you.

Consultative committees

Consultative committees may be helpful for understanding background to a policy or direction for a document.

Internal specialists

Internal specialists may be helpful for understanding background to a policy or direction for a document.

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Managers or other leaders

May be useful for advice, particularly about a general approach to a document or possible information sources. May also be helpful in resolving delays gathering information from other employees.

Business owners

May be useful for advice, particularly for guidance about strategic direction or the overall approach for a document.

Employees in other departments

May be used to provide specialist skills, or to locate specific data. Unless such requests are a standard part of their job, it's courteous to inform their manager or supervisor of the request.

Collate information

Collating information for a complex document, particularly where you are relying on others to provide it, is essentially an exercise in project management. Your document schedule should include following up critical information. Try to consider risks to receiving your information in advance. For example, your schedule may mean that you are expecting financial analysis during a time when the finance team are busy with month-end transactions. You should try to get them the inputs earlier, or perhaps ask their management for support to provide the information.

You may also use external sources to gather information that is not specific to your organisation, or deals with trends in your industry. The internet is an excellent place to start, though you should only use reputable sources, or those whose information can be verified elsewhere. Industry organisations, local councils, government bodies and libraries can also be useful external sources of information.

Example: deal with information gaps

The following demonstrates how Simon deals with the issue of not receiving requested information to meet deadlines.

The problem

Simon realises that he still has not received the samples from Mario on the day he has promised them. Concerned about the photo shoot, he calls Mario and explains that the shoot is scheduled for 12 o'clock the next day, and there will be extra cost if the shoot is delayed. Mario promises to adjust his plans for the morning and have the samples to him by 11 o'clock. Simon decides to call Mario first thing in the morning to make sure this is still the plan. He also advises Jesse, who agrees to call Mario's supervisor to reinforce the importance of having the uniforms for the photo shoot.

Problem resolution

By explaining to Mario how the delay with sample uniforms will affect his cost and timing, Simon is able to persuade him to adjust his schedule and deliver them to meet his requirements. It might have been easier if Simon provided that information to Mario earlier, and also developed his schedule so that there was a little more leeway to check the samples before the shoot. It's appropriate to inform Jesse, because there is a risk of increased cost if the samples are not available, and she can provide support by contacting Mario's supervisor.

Practice task 10

List three strategies you might use to ensure you receive information in the required time frame.

2E Draft text

Your control document will contain most of the information you require, and you should have a clear idea of what you will present to achieve the document purpose most effectively. You are now ready to begin drafting the text of your document.

Depending on your experience in the organisation, and with the type of documents you are creating, you may wish to check some of the following requirements before you begin drafting your text. Having these requirements fresh in your mind before you start writing will help ensure that your text meets these requirements, and will save time when editing.

What to check when drafting text
Review organisation style guide to confirm software application settings match style guide requirements; for example, correct dictionary setting.
Review document purpose, particularly audience and level of audience knowledge.
Review document requirements, particularly document length, language other than English, legal and traditional requirements.
Review relevant organisation requirements, particularly your workstation set-up and sustainability requirements.

Practice task 11

Which of the following are requirements to meet before drafting your document? List the numbers in the text box.

1. Reviewing organisation style guide.
2. Reviewing the data requirements.
3. Reviewing the document purpose.
4. Reviewing relevant organisational requirements.
5. Reviewing document requirements.
6. Reviewing quality of graphics.

2F Use appropriate language

Using appropriate language is critical to an effective document. If the language is too technical or fails to convey information in a meaningful way, the audience will not understand the message, and therefore the document cannot achieve its purpose.

Most readers in a business environment do not have time to read over a document several times to understand its key messages. You must use clear, concise language that is appropriate to the education and knowledge level of the audience. This way, the audience will absorb your message easily, making your document more effective.

Ways to use appropriate language

Some suggestions for using appropriate language are outlined in the following. You should also review and comply with your organisation's style guide.

Minimise technical language
It may not be possible to avoid technical language, but ensure it is used at a level that would be easily understood by the audience. If in doubt, define terms carefully when they are first introduced. You may need to repeat this in longer documents, depending on how frequently the terms are used.

Minimise jargon
Many organisations use unique jargon, abbreviations and acronyms. While these may be in common use within the organisation, defining them when they are first used, and using simple English alternatives where possible will help avoid confusion for new employees or other readers unfamiliar with the terms.

Use active voice
Previous sections have explained how active voice is generally more concise, and easier for readers to understand. Passive voice often requires a more complex sentence structure, which can confuse the message.
Selective use of passive
Traditionally, passive writing was used for formality in business writing, but this trend is declining. Passive voice can be a helpful tool when the writer is deliberately obscuring the subject, such as 'The error was overlooked in the editing process' rather than 'The editor overlooked the error'.

Use simple vocabulary
It's tempting to use your extensive vocabulary. While complex words may more accurately convey the meaning and be more descriptive, if your readers do not understand it, you will not have achieved your purpose. Using simple vocabulary also allows the reader to concentrate on the message, rather than the words.

Use lists and summaries
It may be useful to summarise the key points at the end of each section, using bullet points, tables, or similar lists. This is a concise way of repeating information to reinforce the key messages. When using lists, ensure that all bullet-point headings have the same grammatical structure and flow logically from the leading sentence.

Avoid complex sentences
Keep sentences short and simple, with one subject for each. Paragraphs should also be limited to one primary subject, which is introduced in the first sentence.

Use appropriate tone
Emails, promotional materials or staff newsletters may have a friendly, conversational tone. Documents that may become legal records, such as business letters, tenders or submissions, generally require a more formal tone. Consider your audience when deciding the appropriate tone for your document.

Identify appropriate language

The following presents some examples of the appropriate use of language for specific documents.

Letters

You might prepare a detailed business letter to a franchisee to provide a record of an ongoing negotiation. This letter might include several sections, perhaps one with a chronological list of discussions and agreements, one outlining the franchisor requirements, and one detailing the agreed next steps and schedule. Even if you have regular, more informal correspondence or emails with the franchisee, this document should adopt a formal tone and use simple English in the active voice.

Legal records

Contracts and other legal records must use technical terms with extreme care. Legal documents depend on precise definitions and exact usage of particular terms. If you think your document may have legal implications, consider requesting a legal review to make sure it can't be misinterpreted. Legal documents should also adopt a formal tone.

Training materials

Training materials should carefully consider the general education level, specific subject knowledge level, and the demographic mix of the audience. This will guide the author in adopting an appropriate tone for the materials. If developing a course for school leavers with no background in the subject, rather than a refresher course for mature-age students, you might use less formal language, but more extensive definitions of technical terms.

Example: use appropriate language when drafting text

Simon is drafting the text for his submission. He takes a moment to review the request for tender, the style guide to be used and the submissions to other clients he has been using as a reference. Since this is potentially new major client, he decides a formal tone is best for the submission. He also decides to make a list of the acronyms and abbreviations and include it as a reference.

Simon is right to adopt a formal tone for the tender submission. Submissions often become legal records, and are a formal pitch for business. While this can be more relaxed for longstanding clients, you should err on the side of formality if you are uncertain. Reviewing the document requirements before drafting text can help ensure the text is appropriate and meets the document's purpose.

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Practice task 12

Read the following statements, then write whether they are true or false.

1. Passive voice can confuse the message, as it often requires a more complex sentence structure.

2. Emails, promotional materials or staff newsletters generally require a formal tone.

3. Jargon, abbreviations and acronyms should be used to promote audience understanding of your topic.

Summary

1. Allocating information, reviewing data and comparing it to your proposed document structure is an important part of reviewing and organising your material.
2. Interpreting data, writing brief notes and developing proposed graphics helps to clarify key messages, making final text clearer and more effective.
3. Graphics can help readers understand key information in your document. They should be easily understood by the audience and clearly explained in supporting text. While some illustrations or photographs may be used to add visual interest, charts, tables and other graphs should clarify information presented in the main text.
4. Use the control document to help identify whether you require additional information before you start drafting text. Colleagues, consultative committees, internal specialists, managers, business owners or employees in other departments may be able to provide missing information.
5. Using appropriate language is a critical part of drafting text. In general, you should use simple English in active voice, avoid technical language, jargon and acronyms, and use an appropriate tone for the audience.

Learning checkpoint 2
Draft text

This learning checkpoint allows you to review your skills and knowledge in drafting text.

For the following questions, continue working on the training or workplace document you began in Learning checkpoint 1.

Part A

Review and organise the material for your training document and answer the following questions, explaining each response:

1. How will you know whether the information supports the structure of your materials?

2. Why would you discard information?

Part B

In preparing the text for your training materials, explain how you would use technical information to develop key learning points.

Part C

List five graphics you will include in your document. Explain the objective of each of these graphics, and the key information they should convey.

Part D

Review your document plan.

1. How will you know if there are any information gaps?

2. List the possible sources of information to ensure there aren't any gaps.

Part E

What might you review prior to drafting the text for your document?

Part F

1. Against what criteria will you assess the use of appropriate language?

2. What type of tone and language will you use for our materials and why?

Topic 3
Prepare final text

Complex documents often combine a range of information from diverse sources within an organisation, and information may be updated while you are preparing the document. This often causes errors and inconsistencies throughout the document. While understandable, they can distract the reader and reflect poorly on the author or presenter of the document. It is therefore critical to provide enough time to review your document carefully, and identify errors and inconsistencies before publishing and circulating the document.

In this topic you will learn how to:

3A Review draft text

3B Check for accuracy

3C Obtain approval for draft text

3D Incorporate revisions

3A Review draft text

It's important to complete the review stages carefully, as errors can distract readers from an otherwise excellent document. It's likely you'll complete several reviews of your document, as you process amendments, finalise small details and check the overall functionality of your document. The following checklist summarises the key areas you should review.

Review checklist	Yes	No
Does it achieve the document purpose?		
Does it use language appropriate to the audience?		
Does the format suit the intended presentation forum?		
Does it conform to length requirements?		
Have you used the required templates (either internal or external)?		
Have you conformed to any relevant style guide requirements?		
Have you met any traditional requirements for this document type?		
Have you used a simple, effective writing style with: • active, inclusive, non-discriminatory language • clear, concise sentences of varied length • a high level of readability?		
Have you met referencing standards; for example, bibliography, citations, footnotes, acknowledgments?		
Are your files an appropriate size and type for your chosen format?		
Is the overall content appropriate to the audience's knowledge and skill level?		
Is there a balance of information and examples?		
Are graphics clear, effective and appropriately balanced with the text?		
Is there sufficient information to achieve the document's purpose?		
Is information provided throughout the document consistent?		
Have you checked for spelling, grammar and style errors?		
Have you completed internal reviews, especially legal reviews?		
Have you processed any amendments from the reviews?		
Have you reviewed formatting for consistency and a balance of white space?		
Have you requested proofreading by a colleague or associate?		

Review and version control

It's a good idea to complete your own review as thoroughly as possible before circulating it for approval. This means the reviewer is not distracted by smaller items like style or phrasing, and can concentrate on assessing whether the information or key messages achieve the document's purpose. Providing an advance copy can also help the reviewer.

A detailed review of a document requires concentration, so try to find a quiet place without interruptions. You may find it easier to proofread on a printed copy, identifying your changes on paper before entering them into your document. Using the original requests to check you have met all requirements will help identify any missing elements. Version control is critical when preparing complex documents. If you have been negotiating changes, make sure that you include the correct version.

Example: review the draft

The following example describes how a draft submission could be reviewed.

Simon has completed a draft of both the submission and Jesse's presentation, and has a meeting scheduled with Jesse for review and approval tomorrow ahead of submission in three days' time. Simon prints out a copy of the submission and switches his phone to divert any incoming calls. First, he reads over the company style guide Jesse provided, to refresh himself on the key requirements, and begins to read the submission carefully. Occasionally, he reads a sentence quietly to himself to check the phrasing, making notes with his changes.

Simon takes his copy of the request for tender, and carefully checks that he has provided the key requirements. He marks each of Natalie's requirements with her corresponding section number. He does the same with the notes he took when discussing organisation requirements with Jesse and realises that he has not included a list of their key clients. He adds this to his document. Next, he reviews Jesse's presentation. He discovers that the pricing table has not been updated and rectifies it. He also checks the detailed presentation notes he has developed for Jesse, since the slides only include brief bullet points. He forwards her a copy to review before their meeting.

Practice task 13

Use this review checklist to review a document you have received, either as part of your current study program, at home (for example, a letter from your insure) or in your workplace. List the changes you think should have been made before the document was circulated.

Review checklist	Yes	No
Does it achieve the document purpose?		
Does it use language appropriate to the audience?		
Does the format suit the intended presentation forum?		
Does it conform to length requirements?		
Have you used the required templates (either internal or external)?		
Have you conformed to any relevant style guide requirements?		
Have you met any traditional requirements for this document type?		
Have you used a simple, effective writing style with: • active, inclusive, non-discriminatory language • clear, concise sentences of varied length • a high level of readability?		
Have you met referencing standards; for example, bibliography, citations, footnotes, acknowledgments?		
Are your files an appropriate size and type for your chosen format?		
Is the overall content appropriate to the audience's knowledge and skill level?		
Is there a balance of information and examples?		
Are graphics clear, effective and appropriately balanced with the text?		
Is there sufficient information to achieve the document's purpose?		
Have you checked that information provided throughout the document is consistent?		
Have you checked for spelling, grammar and style errors?		
Have you completed internal reviews, especially legal reviews?		
Have you processed any amendments from the reviews?		
Have you reviewed formatting for consistency and a balance of white space?		
Have you requested proofreading by a colleague or associate?		

3B Check for accuracy

Errors in a document distract the reader, and also reflect poorly on the professionalism of the document. Once again, it's important to review your document carefully to identify any errors with grammar, spelling and style.

If possible, leave your document, even for a short period, before you begin an error check. A short break can often reveal errors that you would not notice if you have just finished writing a document. Alternatively, you may choose to ask someone who has not been involved in writing the document to review it for you.

Check for consistency

It's important to ensure that there is consistency throughout the document. For example, if a sales report provides an overall sales result in the introduction, then this must be consistent with the figures provided in the detailed analysis later in the report. Even if you are not responsible for developing this data, you should review the document for inconsistencies and discuss any with the person who provided the information.

Sometimes, you may not understand the data well enough to identify the inconsistencies yourself, as it may be technical or outside your expertise. In this case, consider asking the person who developed the data to review the draft and confirm that the data is consistently quoted.

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Grammar, punctuation, spelling and style

If you have to create complex documents as part of your job, it's important to have a basic understanding of grammatical rules, the appropriate use of punctuation and how to check for spelling errors. In Australian government departments, English grammar, punctuation, spelling and style generally follows that described in the Commonwealth Government's Style Manual. Many non-government organisations in Australia also follow this guide. This book is a good reference if your organisation doesn't have a style guide or if your style guide does not cover the information you are looking for.

Review your draft document and make sure you have used appropriate language and tone. Here are some specific aspects you need to check as you work through your review.

Grammar
Grammar Sentences with incorrect grammar can be difficult for a reader to understand. Grammar defines how words are used, and in what order words are put together to make meaningful sentences. Many word processing applications, such as Microsoft Word, have automatic grammar checks. These are a good first step to avoid obvious errors. You can generally choose to have them display automatically as you write, or to complete a check at the end of your document. Use your discretion about whether you accept their proposed change, as they generally cannot consider the context of your sentence, or the type of material you are presenting.

Punctuation
Correct punctuation improves a document’s readability. The following forms of punctuation should be correctly and consistently used in accordance with the specifications in the above style manual: • Apostrophes, brackets, colons and semicolons • Full stops (in sentences and in abbreviations) and spacing after full stops • Commas, hyphens and quotation marks Your organisation’s style guide may provide guidance for using punctuation correctly. Some software packages will do grammar checks, which are useful to identify some errors.

Spelling
At a minimum, you should run a spellcheck on any document before you distribute it, even for preliminary review. Check which dictionary is set in your word processing application, as some organisations have a preference for UK spelling over US spelling; for example, using ‘organisation’ instead of ‘organization’. If you are in doubt, consult a dictionary, such as the Macquarie Dictionary or the Australian Oxford Dictionary. There are some spelling errors that may not be identified by automatic spellchecks. For example, you may type ‘form’ instead of ‘from’. Some of these errors may be identified in the grammar checks, but others will not, so review your document carefully for these types of hidden errors.

Style
Make sure the text has the appropriate style and a consistent tone. If you have changed contributors’ text, make sure you check them to review to ensure you have not changed the meaning, particularly for technical material. Read sections of it out loud to yourself. Does it flow easily? Does it seem to take too long to read some sentences, or are you running out of breath? If so, you may find that you need additional punctuation in your sentences, or to write shorter sentences. You should also check your document against any organisational style guide requirements.

Practice task 14

Review the following paragraph. Rewrite the paragraph to increase the use of the active voice, improve the grammar and to correct spelling and punctuation errors.

Ahmed was requested by his manager, Lottie, to review her presentation for the sales' conference, which she was delivering to the regional managers as she is particularly concerned about the combination graph for the sales figures, and whether they are much too complex to present, since they may be hard for the regional managers' to follow. Ahmed, being Lottie's assistant, reviewed the presentation, h corrected some spelling mistakes, Ahmed made notes on some content revisions and he thinks he has a suggestion for presenting the graph more clearly.

3C Obtain approval for draft text

You may be required to have a draft of your document approved before final distribution. The level of approval that is required will depend on the document, your role, your manager's approach and policies within your organisation. This review process may aim to approve content, formatting and layout, legal compliance, and/or style.

Content approval could be required for almost any document. You should consider discussing your proposed content, even at an indicative level, with your manager or other appropriate person before developing the document. For example, if you are developing a budget proposal but your manager doesn't support the concept at all, you will have spent a lot of time developing a document they will not approve. You must always gain approval for documents that will be distributed under someone else's signature, or delivered by someone else. That person should do this or someone authorised on their behalf.

Some documents that may require approval of content include:

- business letters
- public notices
- publications, leaflets and brochures
- recommendations and proposals
- reports
- speeches and presentations
- tender submissions.

Formatting and layout

If you have created a document that will be formatted by another employee or external agency, then you should approve the final layout before it is printed or published. You may also need approval from other stakeholders in your organisation. For example, you may have written a brochure for distribution to customers, which will then sent to the printers for layout. You should request a copy of the final proof before it is printed, and carefully check this for any errors. Correcting errors after printing is expensive and wasteful.

Documents that should be circulated for formatting and layout approval include the following.

Documents to be circulated
• Any document with significant printing or publication cost • Publications, leaflets and brochures • Presentations • Website text

Formatting and style

Almost any document may need to be reviewed for approval of its style, depending on the organisation's policies and also your manager's approach. In general, the more important a document, and the wider its circulation, the more likely your manager or others in the organisation are to approve its content, style and formatting. Some managers make changes to the phrasing of text, because they believe it is more effective or persuasive, depending on the key message and audience.

You may need to seek approval for the writing and document style that you have used, including compliance with:

- the organisation's style guide, pro formas, templates or structures
- genre requirements
- citation standards.

Legal compliance

Any document that may commit the organisation to a course of action, or have other legal implications, should be approved by the authorised person in your organisation before it is distributed. Legal approvals should be the final stage in the approval process, as even minor changes can have legal implications. You should be guided by your organisation's requirements on legal approvals.

Documents that commonly require legal approval include:

- contracts
- policy documents
- publications
- leaflets and brochures
- public notices
- tender submissions.

The review process

Who reviews your document will vary widely depending on the document and the organisation. If there is not a standard procedure in your organisation for approving the type of document you are working on, ask your manager or supervisor if they would like to review it before it is circulated. They may also suggest other people who should review the document.

You will need to allocate time to get approval and perhaps develop a sign-off sheet, as described here.

Allocate time for approval

You should allocate time in your schedule for the review process and to make changes. How much time you need will depend on the size and complexity of the document, how long you expect it to take for the reviewer to return their comments, and how long you will need to enter the amendments. Check management availability for critical documents. If several people will have to approve the document, circulate it in order of increasing seniority. Advise earlier reviewers if there are significant changes made by a later reviewer, to check whether they support those changes.

Develop a sign-off sheet

You may wish to consider developing a formal sign-off sheet for approvals, particularly if there are a number of individuals involved in the review process. This sheet should accompany the draft document as it is circulated for approval, with previous versions attached. The reviewer signs the sheet as part of their approval. This is particularly useful for formal documents, documents requiring external printing and documents with possible legal implications.

Practice task 15

1. Which of the following documents are most likely to require legal approval?
   - Internal meeting presentations
   - Public notices
   - Policy documents
   - Publications, leaflets and brochures
   - Contracts
   - Training manuals
   - Tender submissions

2. What factors may affect the time you need to allow time in your document development schedule for the review process and to make amendments?

3D Incorporate revisions

It's likely that the approvals process will generate suggestions and changes for your document. When you receive the suggestions from the reviewer, ask them whether they wish to see the document again once the changes have been made, or whether they are happy to proceed without further review. If you are using a sign-off sheet, ask them to sign this accordingly.

Some of the common changes that may be required are outlined in the following.

Content

Changes can potentially be quite time-consuming to make. For example, a reviewer might suggest that your sales report include a graph comparing sales figures across years. You will need to collect this information, create the graph, and insert it into your document with supporting text. Reviewers may also suggest removing certain content to maintain confidentiality or to ensure relevancy to the main purpose of the document. Presentations and speeches may require substantial change, as the presenter needs to be comfortable with the content they are delivering.

Formatting and layout

These changes will be relatively straightforward to make, although they can still be time-consuming. Be aware that when external printers and publishers are involved, preparing multiple proof copies can become expensive. Ensure that you circulate the proofs to all affected stakeholders before returning them to the printer. When providing or receiving input about formatting and layout changes, discuss the changes in person or over the phone, rather than simply returning a marked-up document. This helps ensure the correct change is made the first time, saving time and money.

Legal compliance

Some legal input may be non-negotiable. Experts may require wording to be changed to ensure compliance with particular legislation. Other legal guidance is more general, and may relate to minimising risk. While you may choose not to input these kinds of changes, you should ensure that your manager and other affected stakeholders are aware of the decision. It's also prudent to keep a record of their approval not to include these types of changes.

Style

Reviewers may make small changes to wording, or they may simply indicate they haven't clearly understood your message in certain sections and ask you to revise it accordingly. When more than one person will review a document, it's prudent to make changes progressively, so that they are each reviewing the final version of the document. Tracking these changes using version numbers, and filing marked-up notes until the document is completed, is useful if there are any later concerns about what was approved.

Example: make changes

The following describes how Simon approaches the task of making changes to his submission.

After his meeting with Jesse, Simon contacts Frank and Mario to ask them to approve the document. He explains he will send them a copy for their review and then meet with them the next day to secure their approval.

He decides to enter Jesse's amendments before circulating the document. First, he updates the pricing table in both the submission and the presentation, and adds the disclaimer to both documents. Simon enters Jesse's changes to the presentation. He carefully reviews both his notes, and the marked-up copy he provided to her, ticking each change as he enters it. When he has finished, he goes over the notes again to confirm they have all been entered. He saves a new copy of both documents, adding the date and version number to the file name.

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Practice task 16

Read the following statements, then write whether they are true or false.

1. Reviewer input for documents is non-negotiable.

2. The person delivering a presentation or speech needs to be comfortable with the content, so slides and speeches may require substantial change following the deliverer's review.

Summary

1. Review draft text carefully to ensure it meets the document requirements.
2. Check for accuracy, including consistency, grammar, punctuation, spelling and style, before circulating documents for approval, which will help reviewers provide feedback based on content, rather than on style or minor errors.
3. Organisational requirements for approving documents will vary based on their purpose, content, distribution and your experience. They may need to be approved for content, formatting, layout, legal compliance and style.
4. Circulate documents for approval in order of increasing seniority. Enter amendments progressively, retaining any marked-up copies as a reference until the document is fully approved.
5. Ask reviewers to sign an approvals sign-off sheet, which indicates they have approved of that version.

Learning checkpoint 3
Prepare final text

This learning checkpoint allows you to review your skills and knowledge in preparing final text.

For Part A, continue working on the training or workplace document you began in Learning checkpoint 1.

Part A

Identify the key points to consider relating to the areas you should review for the draft of your training materials document

Part B

Read the case study, then answer the questions that follow.

Scenario

You have developed a feasibility study and submitted it for review at the monthly management approvals meeting. As project coordinator, you have compiled information from the finance team, the engineers and your project manager. However, because you ran out of time, you were unable to have the project manager and finance team review the study prior to submission. At the meeting, the finance manager queries some of the figures in the report. It seems that the return-on-investment period quoted in the opening section does not tally with the financials later in the report, and there is a lack of analysis relating to the project's payback. Your organisation's feasibility study template does request the project payback be calculated, but you believed that the information provided as a result of the return on investment analysis would be sufficient given your limited time. The finance manager is therefore unwilling to endorse the proposal until this is clarified. The approval is delayed until next month.

1. What should you have done to ensure you met content requirements?

2. How could you have ensured the data was consistent?

3. Explain what tone you would use for a feasibility study presented to senior management.

4. Explain why an effective review process would have helped prevent the delay in approval.

5. How would you ensure the changes you make to the study will meet requirements?

Topic 4
Produce a document

Creating a complex document of high quality takes a lot of work and organisation. Unfortunately, errors and inconsistencies can distract readers from your core content and key messages. In these final stages, you should review the document very carefully to ensure that your message will be easily understood by the reader. Effective formatting and presentation enhances the readability of your document.

In this topic you will learn how to:

4A Choose appropriate design elements

4B Use word processing software

4C Check documents

4A Choose appropriate design elements

Depending on your job role and your organisation's structure, you may either format the document yourself, or pass it to a formatter. Some elements of formatting may be dictated by your organisation style guide or templates.

Consider formatting requirements in your planning stages, particularly if you are developing a template. This can save you considerable time when the document is complete. If you are developing your own template, consider writing a list of when particular elements will apply to help you check consistency in the proofreading stages.

In general, the design and layout needs to reflect the nature of your document, its overall style and tone. You may use a more traditional, symmetrical layout with conservative textual contrast for a management report, but adopt a more light-hearted, colourful approach for an employee presentation.

Capital letters and acronyms

It is not a good idea to capitalise words as a design feature in professional documents such as letters and reports. However, if you opt to use capitals, make sure you use them consistently throughout your document. Some words always have a capital letter, such as first words of sentences, proper nouns like Australia and acronyms such as ANZ (Australia New Zealand).

Fonts

Fonts can provide contrast in a number of ways, as outlined here.

Size
• Vary text size based on the relative importance of the text. • Headings will usually use the largest text, followed by subheadings, body text then captions. • For body text, try to use at least 10-point serif font to improve readability.

Weight
• Most fonts can be portrayed in different weights, such as bold, italic, underline or combinations such as bold-italic. • These add interest, as well as providing cues for items like headings, introducing new terms and referring to titles. • Plan their use carefully and apply consistently.

Position
• Angle headings, text, or whole sections, to provide visual interest. • This is better for documents relying heavily on visual impact, such as presentations, promotional materials and newsletters. • Use carefully, and ensure the text is still easy to read. • For visual materials, you can achieve a similar effect by balancing the page elements so they are of contrasting size and position, without angling the text.

Colour
• Contrasting text colour can highlight key elements. • Use colour changes sparingly and consistently for headings, warnings, break-out boxes or other key information. • Ensure colours used in presentations can easily be read in the chosen venue, and that any text colours used are clear against the chosen background.

Serif or sans serif
• Fonts that are called serif have small tails or structures on each letter. An example of such a font is Times New Roman. This type of font is used in many books, newspapers and magazines as it is easier to read. • Sans serif fonts such as 'Arial' are used in headings and for shorter pieces of text. • While a mixture of fonts is usual in a document, too many different fonts can make the document difficult and confusing to read.

Headings

Headings provide structure to a document and guide the reader. Here are some ways to style headings to make them consistent.

Consistent styles

Apply heading styles consistently throughout your document to avoid confusing the reader. Heading hierarchies allow for subheadings to be created in a similar style to the main heading. Limit the subsets of headings to a maximum of five within a document, or it becomes confusing for the reader and hard to differentiate different levels of text.

Heading fonts

Heading font styles are often sans serif fonts, while body text fonts are usually serif fonts. Italics are generally used for headings lower in the hierarchy. Numbered headings are convenient for cross-referencing; however, more than three levels of numbered heading (such as Section 4.1.1.3) can become cumbersome.

Heading structures

Headings should be followed by text, even if it is only an introductory paragraph. Sometimes, a topic heading may be immediately followed by the first subheading, such as 'Topic 1' followed by section 1.1. Using three consecutive headings not separated by text (such as adding Section 1.1.1 in this example) is clumsy and confusing. If there is only one of a particular heading level, you should consider removing that level. Topic 1 only makes sense as a heading if it is followed by Topic 2, for example.

Example: MS Word headings

Use fonts to differentiate between different heading levels. Consider the sample from Microsoft Word here.

Heading One	uses Tahoma (Headings) font in size 16, bold
Heading Two	uses Tahoma (Headings) font in size 14, bold
Heading Three	uses Tahoma (Headings) font in size 13, bold
Heading Four	uses Rockwell (Body) font in size 12, bold, italic
Heading Five	uses Rockwell (Headings) font in size 10, bold

Illustrations, diagrams, graphics and images

Illustrations, photographs and other material can be positioned in your document to create appropriate visual interest. Graphics and diagrams are often included to summarise data and trends, thereby adding information to the content of the document. All illustrations, diagrams, graphics and images should ideally be cross-referenced to the content of the document to enable the reader to link the two.

Formal reports may use a more conservative style to enhance images, perhaps by centering a photo under a block of text, surrounded by a plain border and white space. A similar photo may be positioned in the centre of a block of text, surrounded by the words, for dramatic effect, while a presentation may have text in the left block and the photo in the right.

Use numbered labels for illustrations and photographs when cross-referencing to the document, or when the material will be listed with the contents. Use the chapter numbers followed by a sequence number (such as Illustration 4.1: Positioning graphics) for easy reference.

Justification and alignment

Your organisation templates may specify how text should be aligned within the document; if so, follow these guidelines.

Justified text	Justified text is evenly spread between the margins. Spacing between words is adjusted to create this block effect, which may be applied fully across the page or in columns (as it is in newspapers).
Left-aligned text	Left-aligned text has an even space between words but sentences break at different points on the page. Justified and left-aligned text are the most commonly used.
Centred text	Centred text is often used for visual effect, particularly headings. Blocks of text may also be centred for visual impact, particularly in promotional material. This can be distracting if overused.
Right-aligned	Right-aligned text is relatively limited because the text starts at varied points across a page, but ends evenly on the right-hand margin. It is useful for addresses on letters, or columns of figures in a table.

Lists and tables

Bullets, as used in this document, are generally the preferred method for creating lists. Numbers or letters may be used to indicate priority or sequence in a list. Bullet lists are usually indented to one or two levels from the main text to create emphasis. Lists and bullets, like most design elements, should be used consistently throughout the document. Here is some additional information on using lists and tables.

Lists

Ensure that the list adopts a consistent, parallel format that follows logically from the leading sentence. Lists should:

- be in a logical sequence and follow on from the leading sentence
- use a similar sentence structure
- use bullet points rather than numbers
- use similar formatting throughout the document.

Tables

- Tables can help summarise key information in a document.
- If tables will be cross-referenced throughout the document, or if a list of tables will be included with the contents, then number tables so they are consistent with the heading hierarchy. A simple method is to use the chapter numbers, such as 'Table 4.1: Common design elements'.
- The font for labelling tables is usually the same, but smaller than that used for the main body of text.
- A table must always be cross-referenced to the content of the document to ensure the reader links the two.

Page size and layout

There are a number of considerations when it comes to page size and layout. The orientation of the page is often determined by the purpose of the document and what it is intended to contain (for example, some tables present better in a landscape layout). Margins and indentations dictate how much white space is included in a document, and this can affect its readability. Here are some aspects of page size and layout that you need to consider.

Margins and paragraph indentation

Margins should provide balance between left and right margins, and top and bottom margins. Consider extending top and bottom margins if the headers and footers are detailed. Adjusting margins can help include more text if there are page length limitations, but if they are too narrow then a document is difficult to read.

Indenting paragraphs can help highlight text. Lists and bullets should be indented by at least one level from the main text to create contrast. Break-out boxes or side panels can be a helpful tool for providing related information that does not flow easily from the main text. Break-out boxes may be used in training material to provide practical tips on applying the theory being described.

Page orientation

Portrait and landscape are the most commonly used orientations in complex documents. You can switch between the two formats within a document; for example, displaying the main text in portrait format but including a table summarising product in landscape format.

Presentations often have a number of slide templates that can adjust the orientation of a page; for example, different ways of combining text and graphics. Microsoft PowerPoint has a slide-master function, which allows you to create a template for background colour, font style and so on for each of these slide types. Similarly, desktop publishing applications may have more formats to better suit newsletters or promotional materials.

Page size

Different page sizes are used for different documents. This is often related to how the document will be distributed. A brochure that will be posted with an A4 letter in a standard window-faced envelope may be in DL size for easy packing and postage. Posters for display may be A1 sized, while reports are usually printed on A4 paper.

If you are choosing a non-standard page size, ensure the recipients will be able to print it easily. If you choose letter-sized paper (a default for many American organisations), your printer may need adjusting before the document will print.

Logos, branding and identity requirements

Use logos and branding as specified by your organisation's style guide or communications policy. Larger organisations in particular have specific rules about when different logos or branding messages should be used, their placement on the page, and what contrasting colours may be used.

Marketing and branding messages may also need to be incorporated in your document. Presentations may include the current tag line as a footer to each page, or you may be required to use marketing messages at the close of business letters or emails.

White space and colour

Here are some guidelines for the use and amount of white space, and for using colour. Colour can create visual interest in a document. It's also useful to highlight key information. Warnings in a document may be written in red text; input from different individuals may be in a contrasting colour. Here are some aspects that you need to remember about using both white space and colour in your documents.

Using white space

Consider using space between paragraphs to make your document easier to read. Increase the amount of space between sections or high-level headings (such as a double line space) or increased leading after a level-one heading, but only a single line after a level-three heading. Topics and sections may be separated by a page break.

Keep some white space around each element of your document such as between text and other document elements such as illustrations, lists or tables. Margins can be widened to increase the white space on a page.

Using colour

Use colour changes sparingly for greatest effect and consider how the colours work together, particularly whether the contrast text can be seen easily against any background colours. Graphics containing several data series will often use a range of colours for interpretation. Depending on the colours available and background colours, different patterns may be more effective. Remember that colour costs for commercial printing increase with the number of colour separations used.

Consider whether the audience will have access to colour if they print the document themselves. If you are emailing an advance copy of a report, most users will print it on a black-and-white printer, and the colour effect will be lost. It may be best to use patterns or textual contrast in these circumstances.

Web design

Web design needs to accommodate the reader's tendency to scan web documents, rather than read them intently. The following provides some key design principles for web layout.

Web design element considerations
Colour: Text must be easy to read against background colour.
Font: Use common, sans serif fonts of at least 12 points. Unusual fonts will display differently on some computers.
Graphics: Choose file type and size to display quickly and at an appropriate resolution.
Headings and sections: Use extensively to break up information and provide links.
Links: Must use different colours for unvisited, visited and active links that are easily distinguished against background colours.
Paragraphs: Keep these shorter than you would with print documents.
Textual contrast: Different font sizes, bold and italics are most effective. Limit blinking text to short phrases or warnings.

Web structural elements

Website design is a specialist field, so most organisations use a website provider or a trained employee. Consult with these people before formatting your document, as they will most likely have specific requirements for file size and other elements.

Some basic structural elements to consider when designing websites are outlined here.

Structural elements for designing web pages
• Main information or article is located in the central panel. • The masthead is across the top and may include the logo and supporting imagery. • The primary navigation bar is on the left-hand side and appears consistently on each page. • The scroll bar is on the right-hand side for up-down scrolling, on the bottom for left-right scrolling. • The search function is on the top right-hand side. • The secondary navigation bar may be on the right-hand side, and is often limited to home and covering pages.

Adopt and adapt formats

You should adopt formatting techniques that are appropriate to your presentation medium. A blue background with a yellow font will rarely be appropriate for a written report, but they can be an effective display combination.

Adapting the format to specific information is also important, even when you are aiming for consistency. The key objective is to convey the information clearly, and templates should be flexible enough to accommodate this.

Creating a link between the two documents by using the same text for the headings helps the readers make the connection and improves their understanding of the key message. You should try to create similar links between related documents.

Example: choose appropriate design elements

Simon is formatting the presentation for Jesse to deliver to the automotive repair chain. Here is how Simon selected appropriate design elements for his submission.

Adapting the format

Simon decides to use his organisation's corporate colours as a guide for his presentation. Since there is no standard template, he designs one himself so he can use it again for subsequent presentations.

He decides that he will display their logo on the bottom right-hand corner of each slide. On the left-hand corner of the slide template, he includes the date of the presentation. Since the logo is dark blue with silver edging, he decides to make the background of the slides blue, and to use yellow font so it can be clearly distinguished on the screen.

Creating links

For slides with graphics, Simon displays text on the left-hand side, with the graphic on the right. He realises the slides with pie charts are more effectively displayed with the text on top, but retains the other format for the column graphs and photographs.

Simon has structured the written submission with numbered heading hierarchies. Since there is some introductory company information in the presentation, he can't use the same section numbers, but decides to use the same headings in her presentation.

Practice task 17

1. What type of nouns always use capital letters in a document?

2. What size font should be used to ensure readability for web text and for printed body text?

3. What is the maximum number of heading levels you should use in one section of a document?

4. If illustrations and photographs will be cross-referenced in the document or included in a list with the contents, what type of labels should you use?

5. When is centred text generally used?

6. When are numbers or letters used for a list?

7. How can you alter margins to increase the white space on a page?

8. If you or the person who will print the document doesn't have a colour printer, how can you format graphs in software programs to ensure contrast?

4B Use word processing software

You may be responsible for formatting your own document. If so, you will need to be familiar with the software applications used to format such documents.

Generally, you will format the document in its original application. This topic does not aim to cover how to format documents in every software application. It may be helpful to attend a training course specific to these applications, as there are often shortcuts that may not be obvious to a casual user, but can save a lot of time.

Tips for using Microsoft Office products

Some tips for using Microsoft Word for common formatting elements are provided here. Many of these principles apply consistently throughout different Microsoft Office applications. These may vary on your own system depending on your version of Microsoft Office. Search for key words in the help function (usually accessible with the F1 key) for specific instructions.

Capital letters and font
Add words that must have capital letters to the dictionary. Use AutoCorrect settings to prompt for incorrect use of capital letters. Select fonts from the drop-down menu, usually in the Home or Font toolbar.

Headings
Use pre-set heading styles or customise your own in a document, then save it as a template. Use cross-reference tools from the Insert toolbar to refer to earlier sections if you have used heading styles. This will automatically update if you change numbers. It will also automatically create tables of contents, lists etc.

Illustrations and photographs
Use Insert toolbars. Use 'paste special' function to copy from other Microsoft applications. Choose the file type carefully to minimise impact on overall file size. Use Picture toolbars to crop or adjust layout. Use captions to label images, which can be numbered and linked with section headings. This allows you to use cross-references that will automatically update and also create tables of contents.

Justification, alignment, margins and paragraph indentation
For justification, select text and choose from paragraph settings. Use Page Layout tools for creating columns. Columns may require section and column breaks. Use Margins tools for adjusting margins, and Paragraph for formatting paragraphs. Use the Insert toolbar for adding break-out boxes and other shapes to your document.

Page orientation and size
Use Page Layout tools for page orientation. Can usually also be accessed from print preview or file menus. Use Page Setup tools for page size. Can usually also be accessed from Print Preview menus.

Lists and tables
Use Paragraph for choosing or customising bullets; also right-click on an existing list and format from there. Use Increase Indent and Decrease Indent buttons to adjust indentation in lists. Use cell alignment to adjust how text is displayed in tables. Select text then right-click to add formatting for headings and shading. Use captions to label tables. Captions can be numbered and linked with section headings.

Logos and branding
Import using Insert toolbar. Use Format Picture functions to adjust layout. Import in smallest file size for good visual display to reduce impact on overall file size. Use Header and Footer tools to insert on every page.

Templates
Use the Save As tool, then choose Template to create your own template. Start new files using File, New, then choosing your allocated template to access templates.

Use of colour
Select Font and right-click to access the editing font menu. Clip Art and Word Art can also be used to add colour and visual effect. Select an element (such as a table cell) and right-click to fill with colour. Use Page Layout tools to adjust the page display colour.
Use of white space
Use line-spacing tools for space between paragraphs and bullet points. Use Page Setup tools for adjusting margins. Use section breaks and page breaks to create space between sections.

MS PowerPoint features
Microsoft PowerPoint offers a range of different slide displays for presenting title slides, slides with text, slides with multiple text boxes, slides with graphics and so on. Editing the Slide Master will allow you to create your own template.

MS Excel features
Microsoft Excel offers similar formatting techniques for fonts, page shape and page size. It also has a number of other options guiding table styles, choice of colours for data series and so on. Generally, selecting an element such as a column in a graph and right clicking will offer the basic choices for formatting that element.

Practice task 18

Watch the following videos by Microsoft to learn more about using Word and PowerPoint:

- Create visually compelling documents in Word 2010' teaches about formatting and including images and graphics in MS Word. Visit: https://support.office.com/en-au/article and search for 'visually compelling documents'.
- 'PowerPoint 2010 tips and tricks' offers helpful timesaving techniques. Visit: https://support.office.com/en-au/article and search for 'PowerPoint 2010 tips and tricks'.

List at least three things you learnt from each video.

4C Check documents

This topic discusses editing and proofreading your document, which are similar to the reviews you have already performed. However, the approval process, amendments and other changes can generate new errors, including spelling mistakes, incomplete sentences or formatting errors, so a final check is important.

If you are responsible for both editing and proofreading your document, then you may find there is some crossover between the two functions. Depending on your job role and organisation structure, these functions may be performed by different people, so details have been provided for both sections. If you are satisfied that you have performed a check fully and no changes have been made since, then it's not necessary to repeat the check.

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Substantive editing

Substantive editing includes the reviewing the following aspects of your document:

- Clarity
- Completeness of information
- Document structure
- Language used and its appropriateness to the audience
- legal requirements
- Repetition of information
- Style used and its appropriateness to the audience
- Useability of the document compared to its stated purpose

Copyediting

Copyediting follows substantive editing and includes the elements that are shown here.

Language review
Review text for overall clarity. Make sure you consider your audience carefully when assessing clarity, including their general education level and knowledge of the subject matter. Correct any remaining spelling and grammar errors. These may have been identified in earlier reviews; however, amendments and revisions may have created new errors, so it's worth repeating the review at this stage.

Consistency
Confirm that language is used consistently. If you have been following a style guide for spelling, capitalisation and other language points, then check that all language follows this guide. Other elements that may be affected include hyphenation, abbreviations, choice of US or UK spelling, and overall style and tone. Finally, check that the formatting has been applied consistently throughout the document. Have you applied heading hierarchies consistently? Is there a consistent use of white space? Are lists and tables formatted similarly? These types of checks will help ensure your layout looks professional and will ensure the reader is not confused or distracted by inconsistencies.

References
Check cross-references, such as 'Table 1.3 shows... '. If you have used automatic links for cross-references, refresh the links before completing these checks. You should refresh these links whenever you make a change to a label or cross-reference. Check that any web links are still current. If a particular style of referencing, such as the Harvard style, is required, check that all references follow this style; otherwise, check the same style has been applied consistently. Make sure sources have been acknowledged and that any copyright requirements have been followed.

Document completeness
Depending on the nature of your document, you may require supporting sections, including: • covers and text for covers • executive summary • footnotes and endnotes • appendices • lists of abbreviations, key terms or a glossary • references or bibliography • index or table of contents • copyright or library classification data.

Section completeness
It's often easier to compile sections when the main body of the text is complete, so ensure that you allow enough time to prepare and review these documents. Ensure information in these supporting sections is consistent with the main body of the text, in terms of presenting the same data, following the same style guidelines and a similar format. Spot check the information in reference documents against the main body of the text. Check the executive summary very carefully. Some members of the audience may read this but only scan other material. Errors in could therefore have a significant impact on these readers.

Functionality

It's embarrassing for the speaker if a PowerPoint presentation does not display as expected, or supporting audio-visual material fails when it's activated. Check these types of documents in the way they are most likely to be used as much as possible.

For internet documents, you should review a test site before the documents are activated to simulate a real environment. Check the links between different sections are functioning correctly and that any file downloads are working. It's also helpful to ask someone who has not been involved with the project to complete these types of checks.

Proofread the document

Proofreading aims to identify errors at a detailed level. It's sometimes difficult to identify these types of errors in your own document, so consider asking someone reliable, who has not been involved in developing the document, to proofread it for you. Here are some aspects to proofreading that you need to bear in mind.

Editing versus proofreading

There will often be some overlap between the editing and proofreading process. Even if you are completing both reviews yourself, it's helpful to complete them separately, as you are reading for different things for each stage. Editing is primarily about the content, structure and style of the document, while proofreading aims to identify errors at the detailed level.

Proofreading approvals

You may find that you repeat the proofreading process if there are several levels of approval for your document. This will vary depending on who is reviewing your document, but in general, you would prefer your reviewers to focus on identifying opportunities to better achieve the document purpose. Proofreading a document before circulating it can remove distracting errors and enable the reviewer to focus on these opportunities.

Marking up changes

It can be easier to proofread a document in printed form. Mark up any errors to be amended in the source document. If you are checking an on-screen document, keep a list of errors for the website provider. Some software applications allow reviewers to suggest changes that can be accepted or rejected by the author using the Review>Track Changes function.

How to check for errors

Here are some ways to approach checking for errors during proofreading.

Checking for accuracy

You should repeat the check for accuracy if you have made any amendments, and conduct spot checks to ensure consistency. Consider having a subject matter expert check any speciality areas. If you have been making progressive amendments to the document, check them against any written notes, to verify that all amendments are entered and match your notes.

Proofing the layout

Ensure that sections of the document flow. For printed documents, check each page using the print preview function to identify that sections, tables, lists and illustrations flow. You might adjust a caption that is on a separate page from the illustration. For documents that will display on-screen, simulate the display to check the layout. This may involve using a test site for web documents.

Checking spelling and punctuation

Spelling and punctuation errors should have been captured in the editing process. If the document was edited by someone else, confirm that there is no deliberate reason for these choices, such as following a particular style guide. Otherwise, correct any errors that you identify when proofreading your document.

Ensuring conformity to specifications

Check against organisational or your chosen style guide specifications. You may also need to comply with design specifications, which may include directions on layout, spacing across a page, location of file-tracking information, or many different formatting requirements. Check elements are consistent throughout your document.

Checking cross-references and links

Ensure the captions, headings, page numbers, tables, illustrations and graphics and their sequence are all correct, and links are working. Bear in mind some software applications restart page numbers with each new section, which can create several pages numbered ‘page 1’ within a single document.

Checking printing and collation requirements

You may be responsible for printing and collating the document. Ensure you check a printed version of the document before distribution, even if you will distribute it electronically. It’s easy for things to go wrong if you hurry this stage, so allow sufficient time.

Example: edit and proofread documents

The following explains how Simon edits and proofreads a presentation and formal submission.

Checking the presentation

Simon reviews the presentation in slide-show format on the laptop they will use in the presentation. He realises that some of his selections, which have headings 'flying in' to the slide are quite time-consuming, so changes some of them to 'appear'. He also checks that the links to his Excel file are working. Simon sends a sample presentation to the printer to check that it will print well in black and white. He also prints a sample of the handout pages, which print three slides to a page, with room to make notes.

Checking the submission

Simon reviews the formal submission. He refreshes the links for the table of contents, and checks there are no errors. He reviews each page in print preview format to check the layout and page numbers. He prints and collates a sample copy of the submission document to proofread, as it would be read by Natalie and her colleagues. After marking some minor errors, he prints and collates the remaining copies ready for the next day's meeting, and provides a copy to Jesse, with a summary of the changes made.

Practice task 19

1. What are the two types of editing?

2. What elements, in addition to those covered during the copyediting process, does the substantive editing process include?

3. What is the primary difference between editing and proofreading?

Summary

1. Document design will vary depending on the document purpose and the organisational style. Design should enhance the readability of a document, not distract from it.
2. Some common design elements include using different fonts, headings, illustrations and graphics, lists and tables, logos and branding, colour and white space. Templates can be used to standardise design elements or to recreate similar documents.
3. Different software applications can be used to create different design elements. Many provide standard templates for particular document types, or allow users to create their own unique templates.
4. Checking documents carefully is a critical final stage. Documents should be carefully checked for appropriate use of language, accurate references, overall completeness and functionality.
5. Proofreading involves a final check of spelling, punctuation and grammar. It should also include reviewing the document as it will be seen by its audience, whether it's a slide presentation or a printed document.

Learning checkpoint 4
Produce a document

This learning checkpoint allows you to review your skills and knowledge in producing a document.

Part A

Create a template for a document in your preferred word processing application. Your template should include at least six different design elements and should vary from the default setting of the software application. Include the following in your response:

- A brief description of the type of document.
- Details of your chosen software application including version number or date.
- Description of each element included (for example, heading hierarchy) and when it would apply.
- Your reasons for including this element.
- Your reasons for applying the element in your chosen way.

Submit your document for review.

Part B

Using Track Changes, edit and proofread the Sustainability policy document for a company called BizOps. The Word document can be downloaded at: http://chilp.it/19c1daf or by scanning the QR code.

You should submit a marked-up copy, indicating the changes you have made.